



Basic Demographics

2. Map: 2010 City of Seattle Census Profile
3. Seattle's Growing Population and Housing Stock
4. Map: Percentage of Population Who Are Persons of Color
5. Map: Distribution of Population by Race/Ethnicity
6. Map: Percent of Population Who speak English Less Than Well
7. Map: Percent of Population Under Age of 18
8. Map: Population under 200% of Poverty Level
9. Map: Renter Occupied Units by Census Block
10. Household Size Trends
11. Poverty Rates by Race/Ethnicity
12. Homelessness in Seattle

Housing & Affordability Characteristics

13. Affordability & Availability – Rental Housing
14. Severely Cost Burdened Households
15. Severe Housing Cost Burden by Race/Ethnicity
16. Rent Trends
17. Map: Average Rents by Sub-Market (1 Bedroom)
18. 1 Bedroom Average Rents by Sub-Market
19. Housing Affordability for Working Households – Studios
20. Housing Affordability for Working Households – 1BR
21. Housing Affordability for Working Households – 2BR
22. Housing Affordability for Working Households - 3BR
23. Rental Housing Affordability & Availability by Unit Size
24. Households Size & Rental Unit Size
25. Race/Ethnicity by Income – Renter Households
26. Race/Ethnicity by Income – Owner Households
27. 2014 Fair Housing Testing Preliminary Findings
28. Homeownership Rates by Race & Ethnicity
29. Seattle Households by Income – Owners & Renters
30. Housing Needed to Accommodate Growth by Income
31. Housing Units by Year Built
32. Age of Apartment Buildings & Rents

Office of Housing & DPD Programs

33. Graphic: Ways the City Affects Housing
34. Department of Planning & Development (DPD) Programs
35. Office of Housing (OH) Programs - Target Income Ranges
36. Rental Housing Program - Households by Income
37. Map: Office of Housing Portfolio
38. Rental Housing Program - Households Served by Race/Ethnicity
39. Households Living in OH Income-Restricted Units
40. Rental Housing Program – Homeless Housing & Households Served

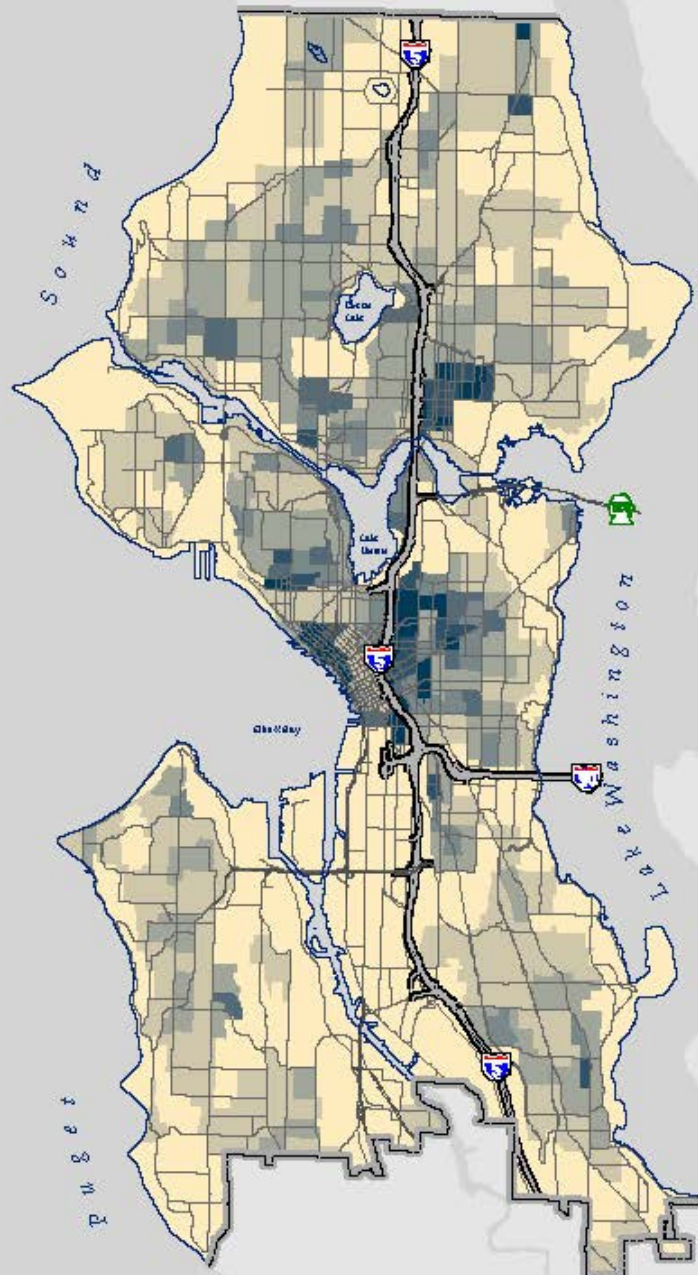
Land Use & Development Characteristics

41. Map: Zoning
42. Map: Where Multifamily Housing is Allowed
43. Map: Residential Growth by Urban Village/Urban Center
44. Zoning Capacity for New Housing
45. Construction & Permit Volumes
46. Housing Units Constructed 2005-2014
47. Cost Breakdown of Newly Constructed Housing
48. Cost to Construct Parking
49. Map: Accessory Dwelling Unit Production
50. Map: Micro-housing and Congregate Housing
51. Tenant Relocation Assistance
52. Map: Percent Changes in Average Rent (Spring 2005 to Fall 2014)

Selected slides updated 6/26/2015

2010 Census Profile: City of Seattle

2



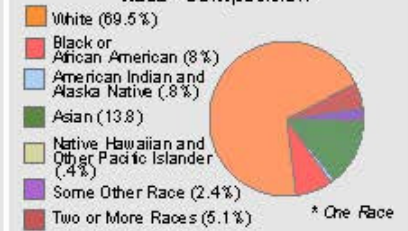
Population per Acre
by Census Block Group



City density is
11.4

0 0.5 1 2 3 Miles

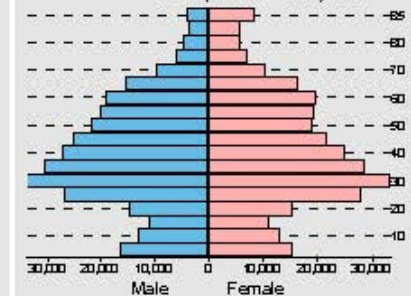
Race* Composition



Hispanic or Latino (of any race)
makes up **6.6%** of the area population.

Population by Sex and Age

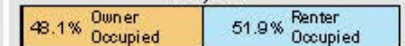
Total Population: **608,660**



Housing Tenure

Total Occupied Housing Units:

283,510

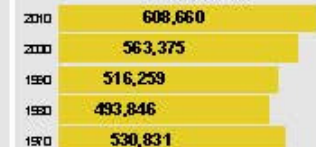


Average Household Size
of Owner-Occupied Units:
2.31 people

Average Household Size
of Renter-Occupied Units:
1.83 people

Total Population

1970 to 2010



Prepared by: Planning and
Development
Source: U.S. Census Bureau
Census 2010

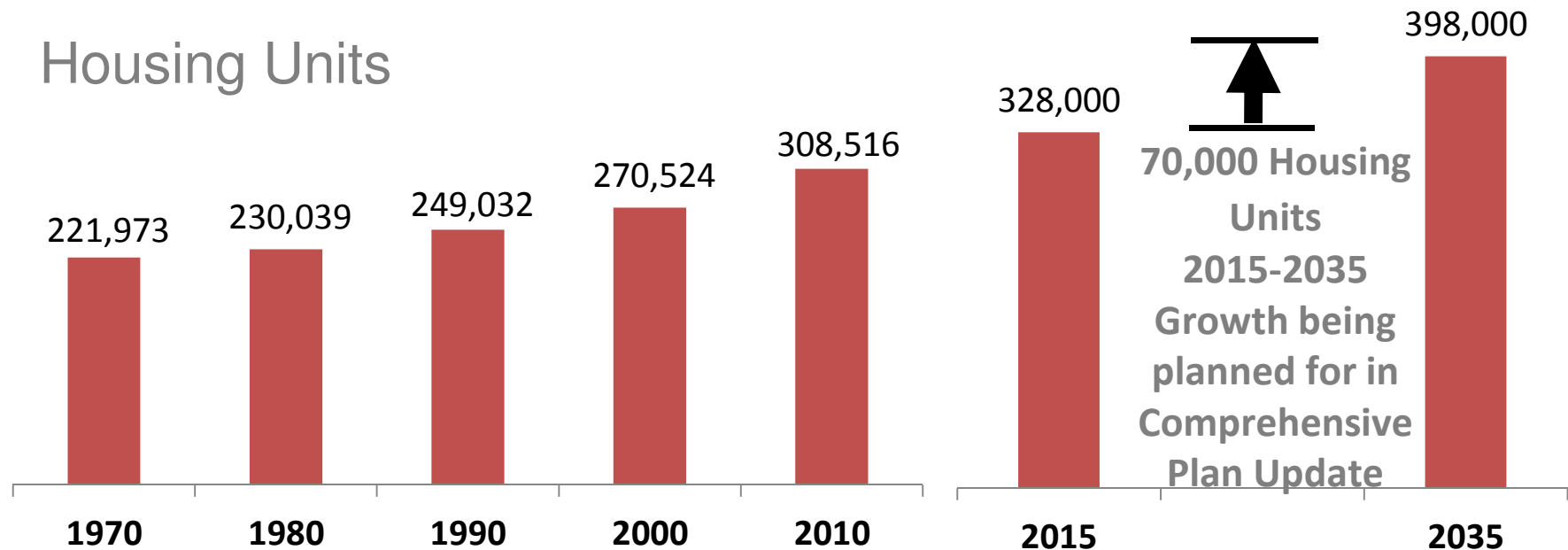


Seattle's Growing Population and Housing Stock

Population

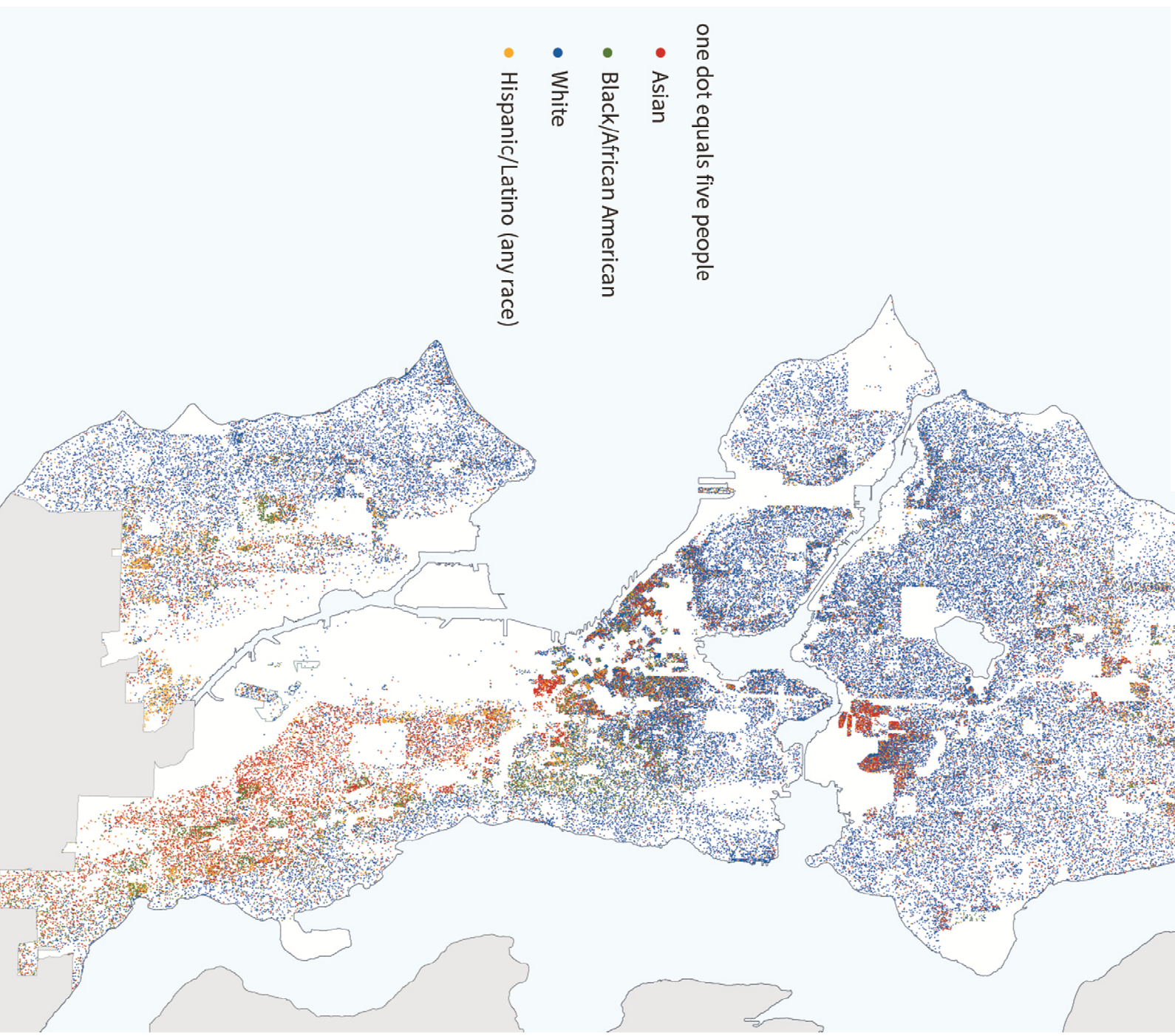
530,831 493,846 516,259 563,374 608,660 —————> ~725,000

Housing Units



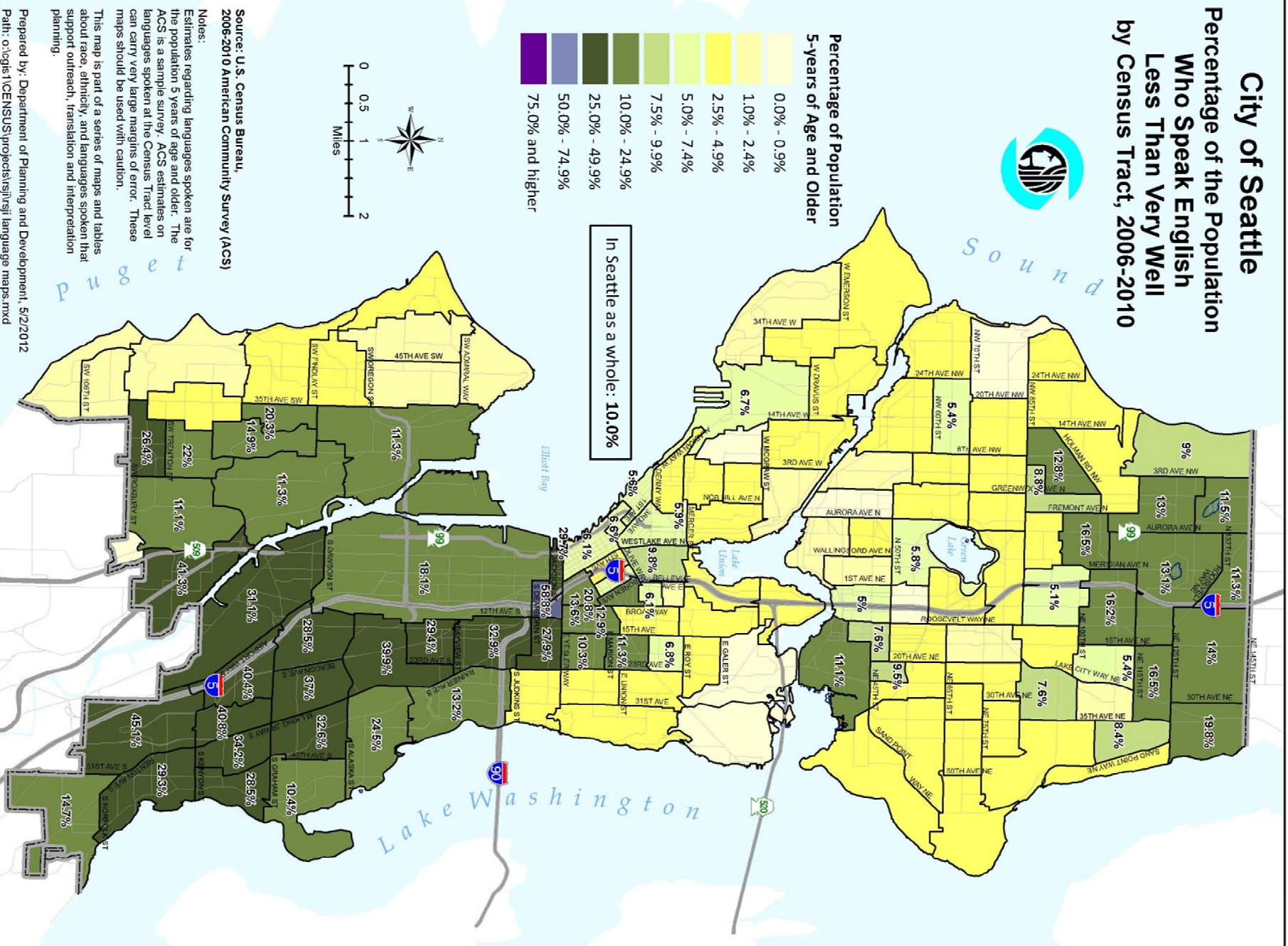
Source: U.S. Census Bureau, Decennial Census; 2015 to 2035 growth estimate in "Updating Seattle's Comprehensive Plan Background Report;" 2015 housing informal projection by SPC Demographer.

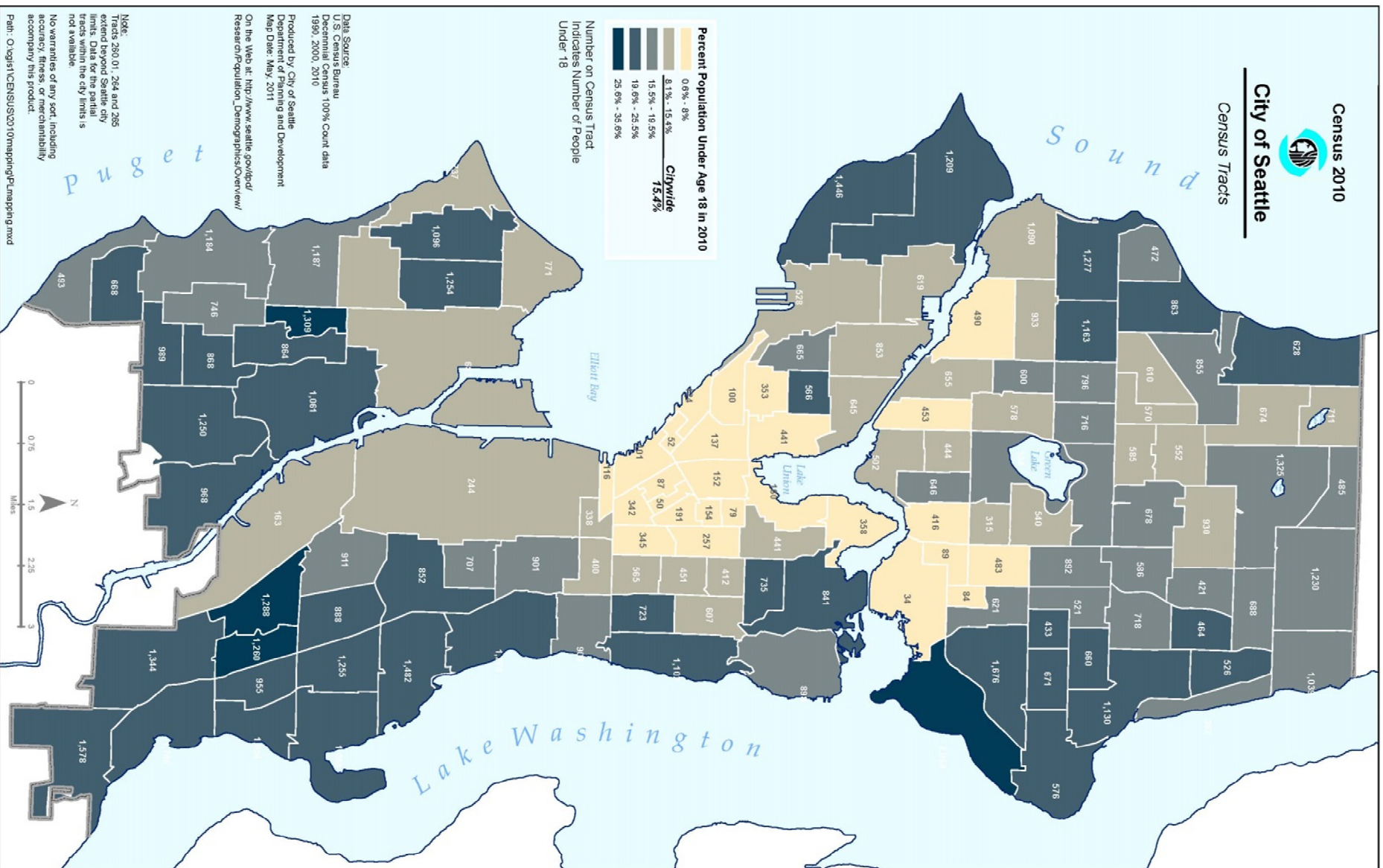
2010 Distribution of Population By Race / Ethnicity

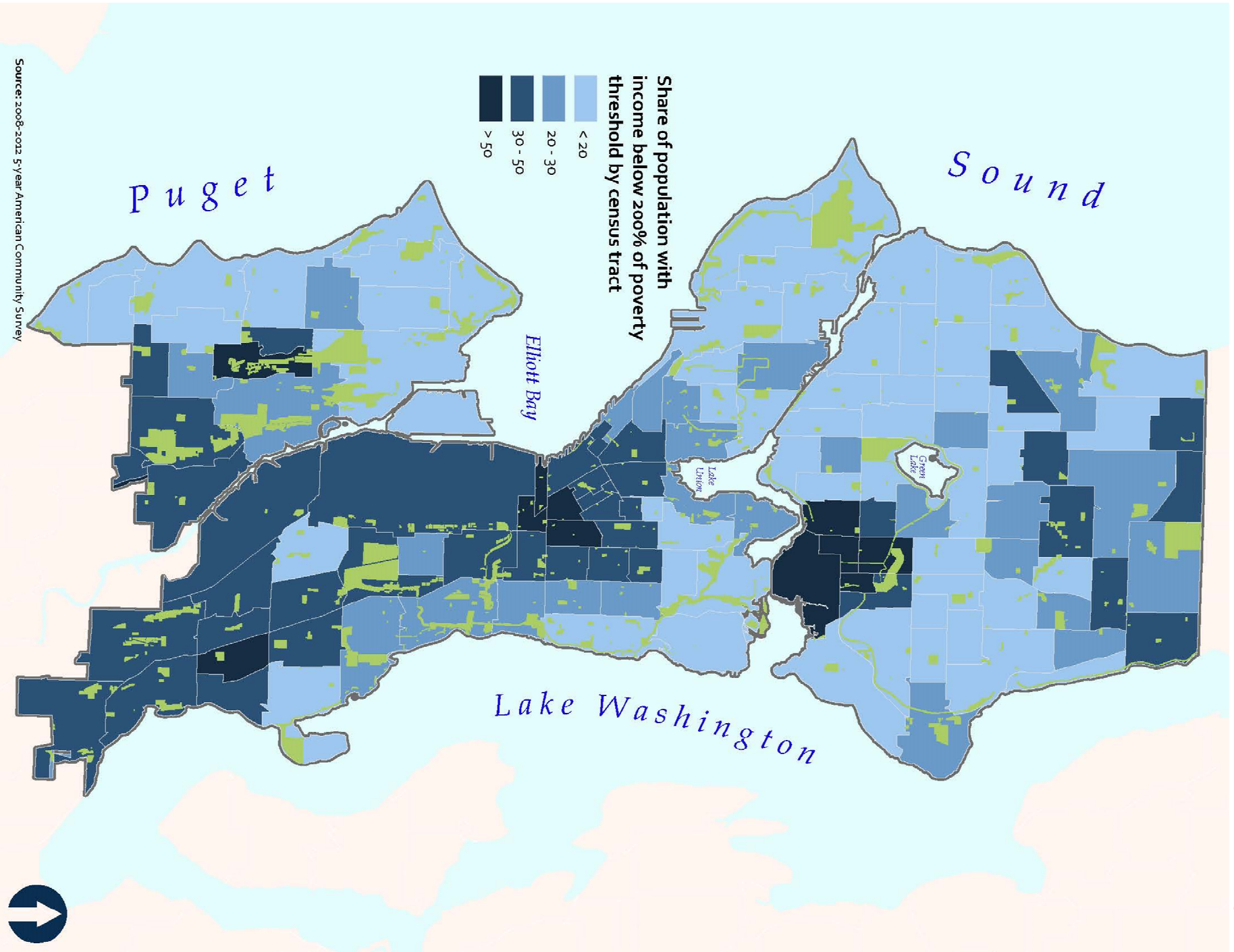


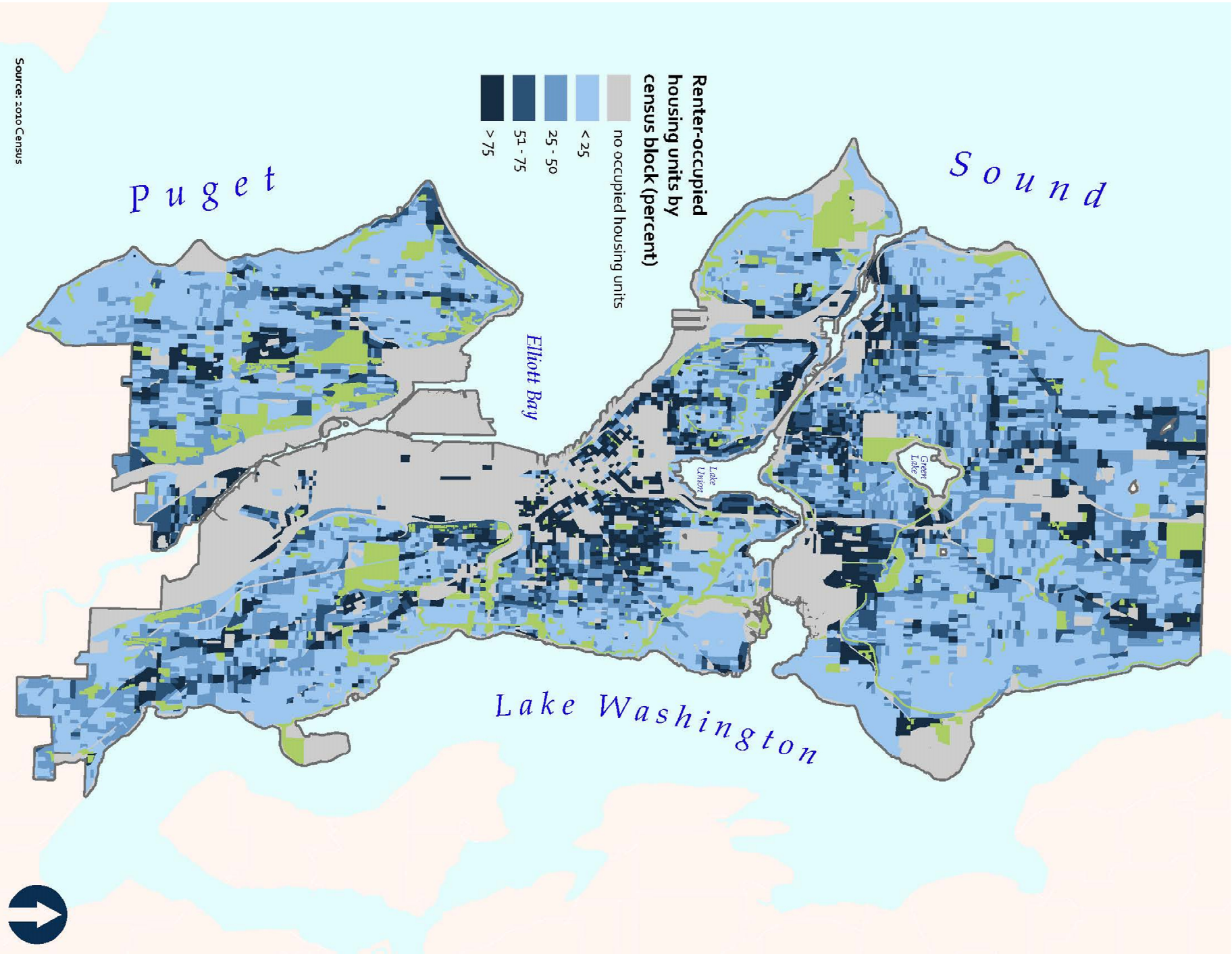
City of Seattle

Percentage of the Population Who Speak English Less Than Very Well by Census Tract, 2006-2010





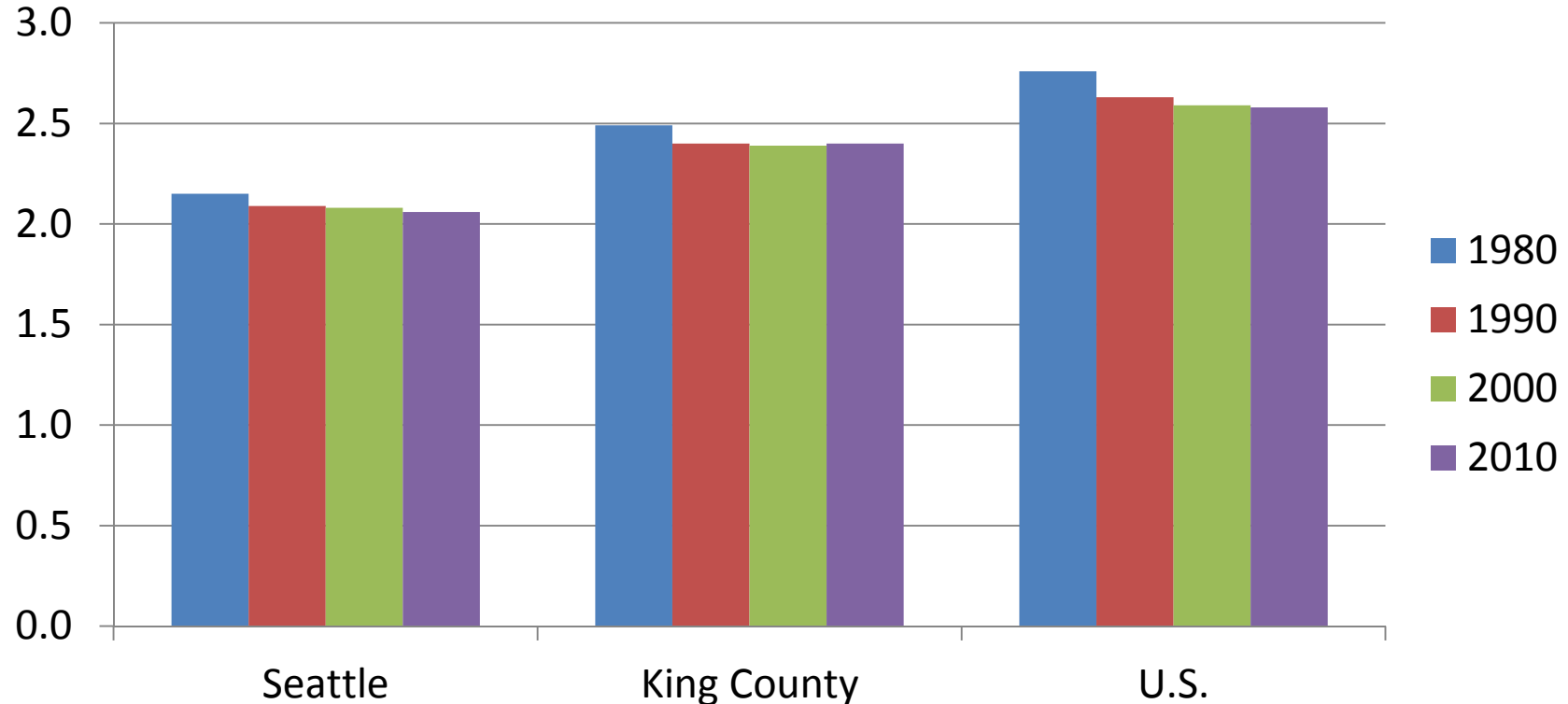






Household Size Trends

The long-term trends show that average household size is declining. Household sizes increased after the Great Recession but are likely to resume previous trends.

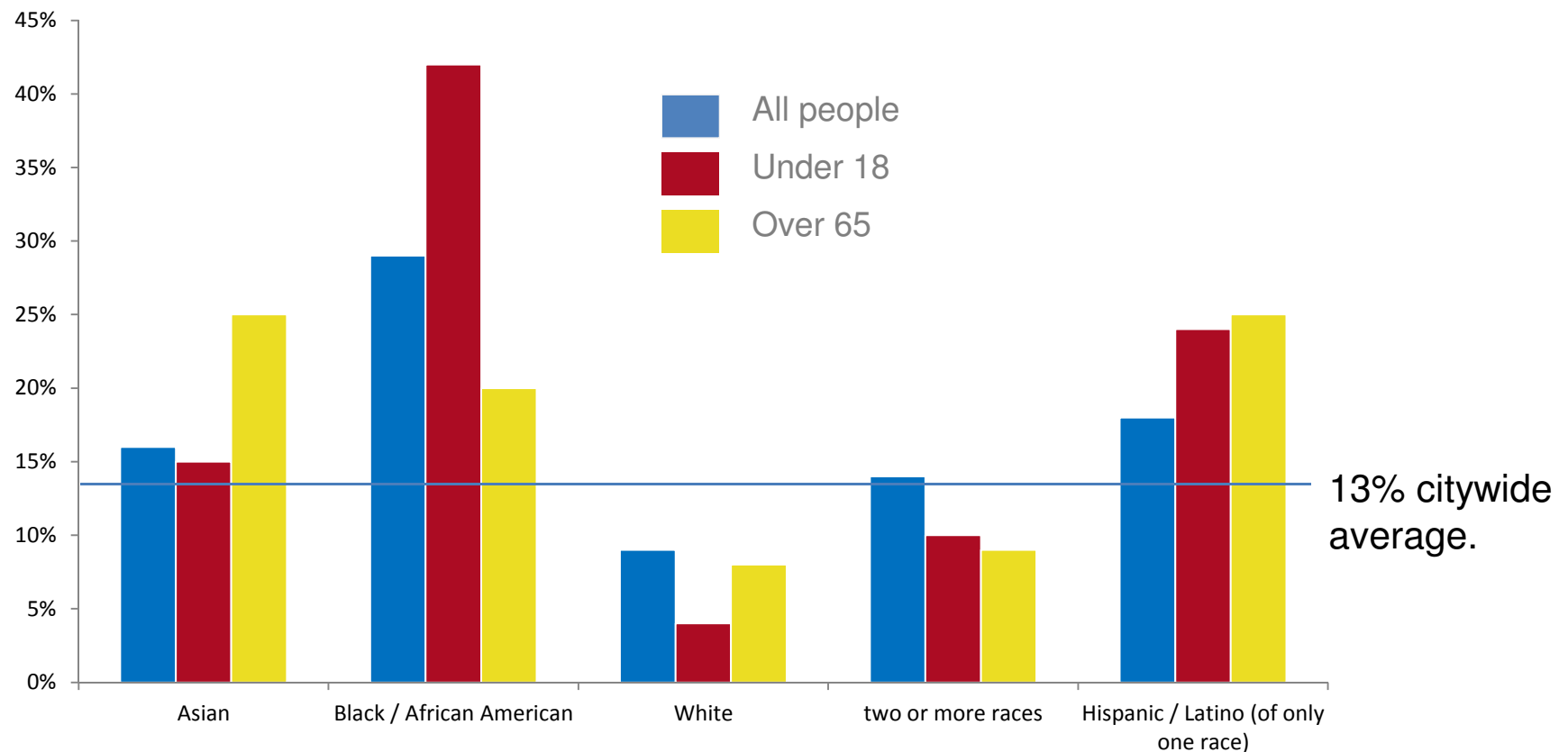


U.S. Census Bureau, Decennial Census.



Poverty Rates by Major Racial Category and Hispanic/Latino Ethnicity

Poverty rates vary greatly for different races and ethnicities, especially among children and seniors.



Source: US Census. 2010 decennial Census.



Homelessness in Seattle

In January of 2014, there were **2,303 people** surviving on the streets without shelter in Seattle.

In addition, another **2,390 people** were staying in emergency shelter.

Seattle is part of a statewide trend in rising numbers of homeless students, with 71% staying in emergency shelters.

Number of students who were homeless in Seattle Public Schools in the 2012-2013 school year.

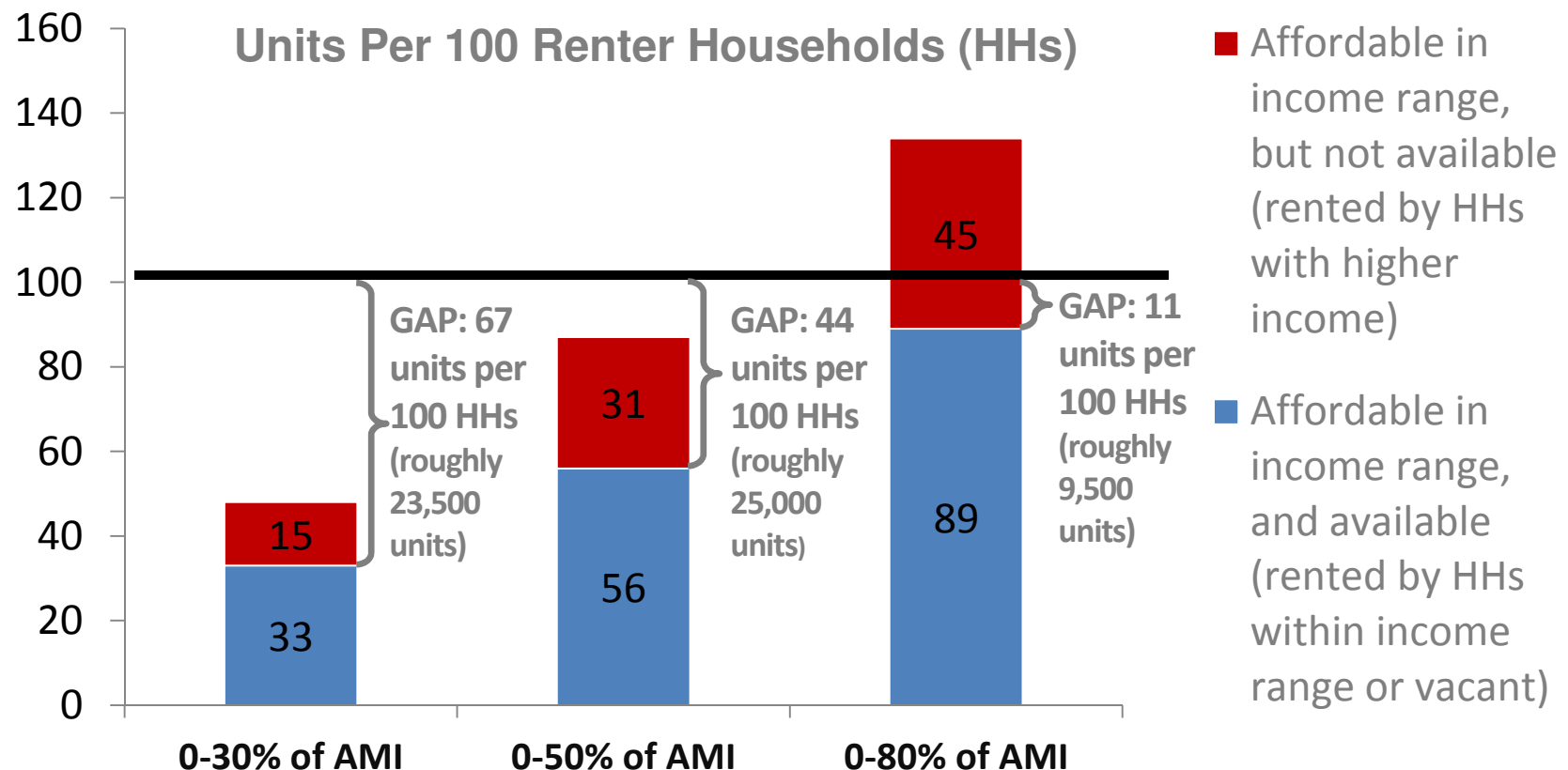


Sources: 2014 King County One Night Count Data;
“Homeless student count in Wash. hits record high”, Seattle Post-Intelligencer, February 27, 2014.



Affordability and Availability: Rental Housing

The gap between renter households and affordable *and* available rental housing units is greatest for lowest income households. Part of the gap is due to higher income households renting units affordable at lower income levels.



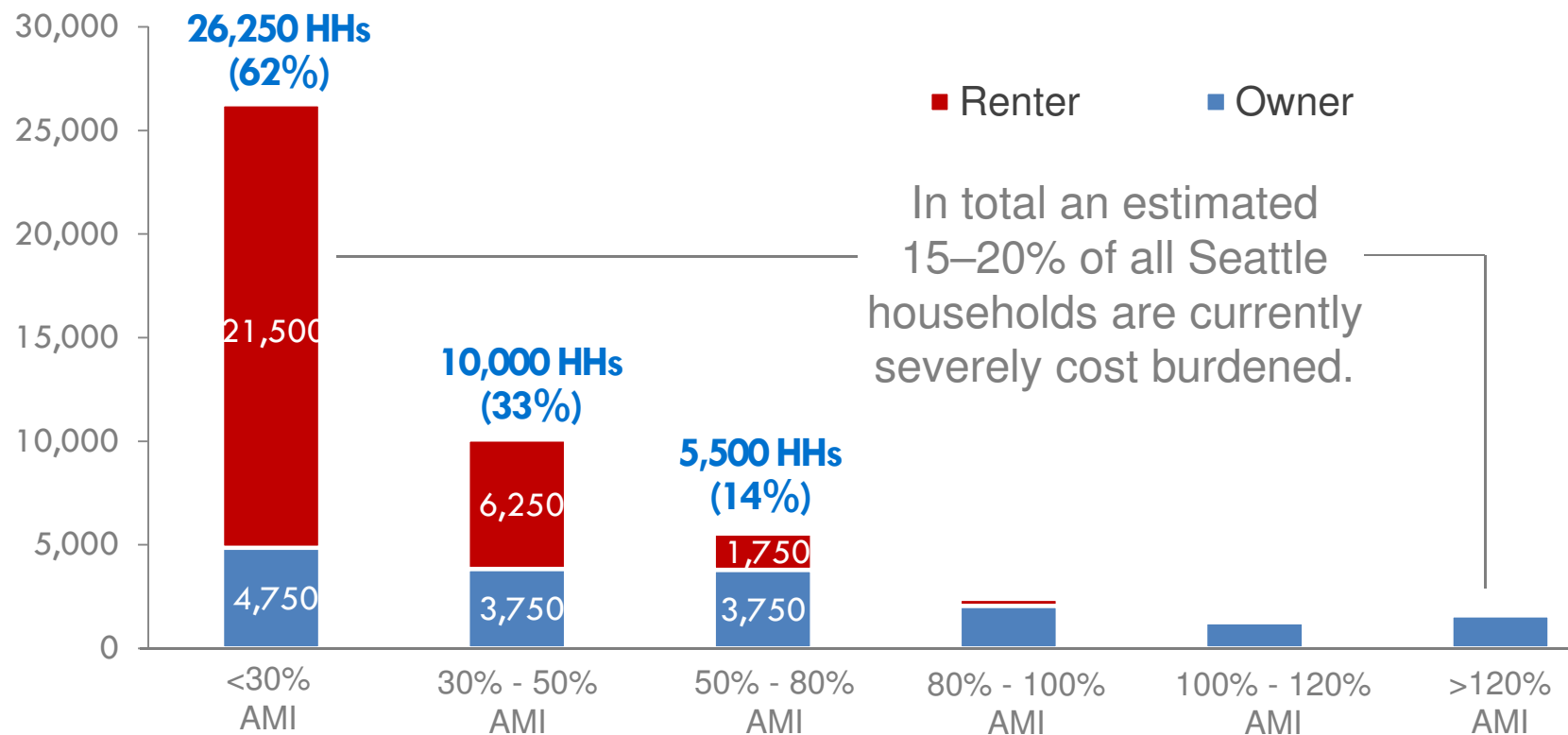
Source: U.S. Housing & Urban Development, CHAS, 2006-2010 5-Year American Community Survey, Seattle city.

Note: these are rough estimates.



Severely Cost Burdened Households

About 26,250 very low-income households (or 62% of the households in the 0-30% of AMI income bracket) spend more than half of their income on housing.

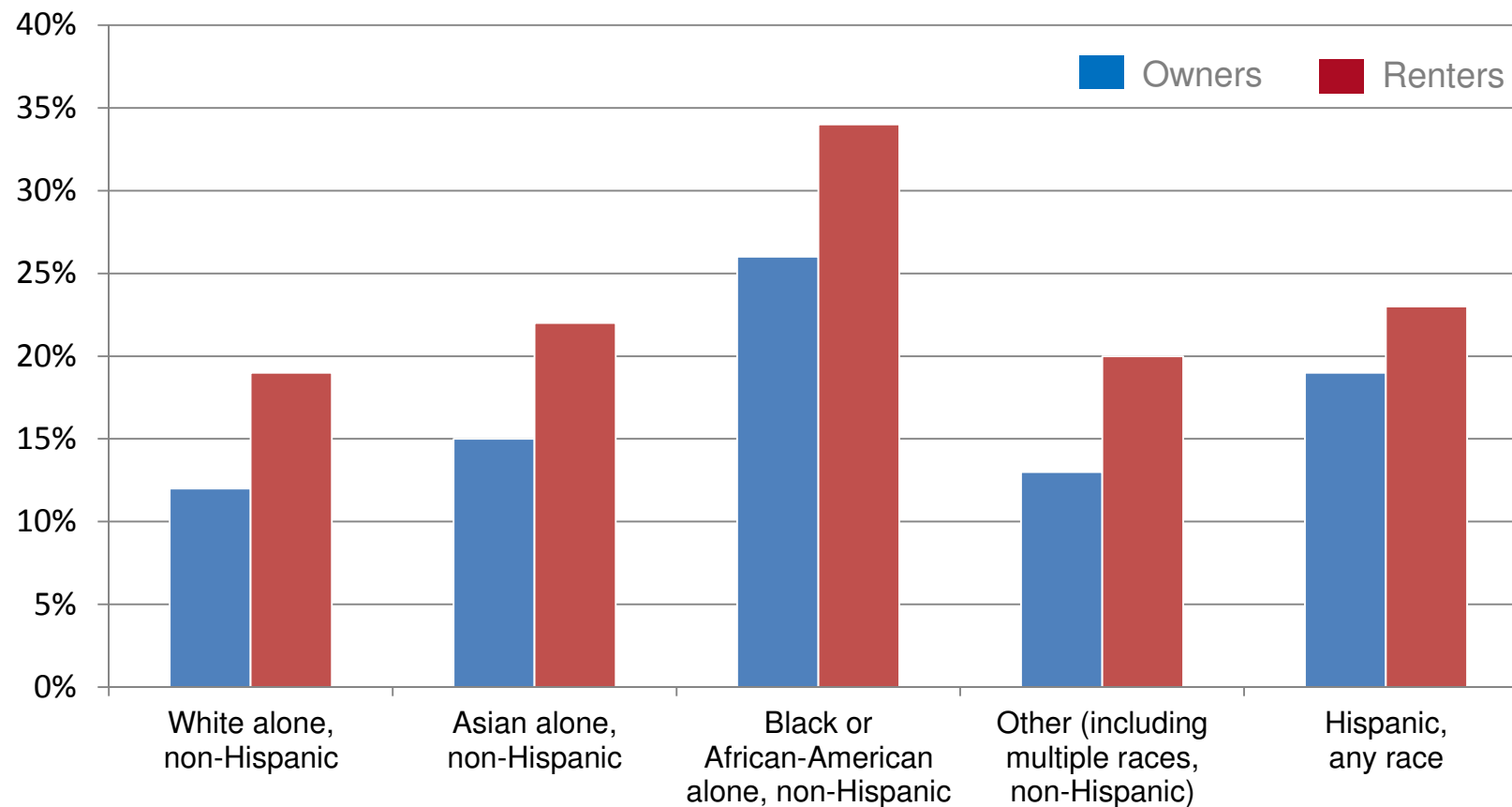


Source: U.S. Department of Housing & Urban Development, CHAS, 2006-2010 5-Year American Community Survey, Seattle city. Note: these are rough estimates.



Severe Housing Cost Burden by Race/Ethnicity

Over 25% of Black/African American owner households, and close to 35% of Black/African American renter households, pay more than half of their incomes for housing.

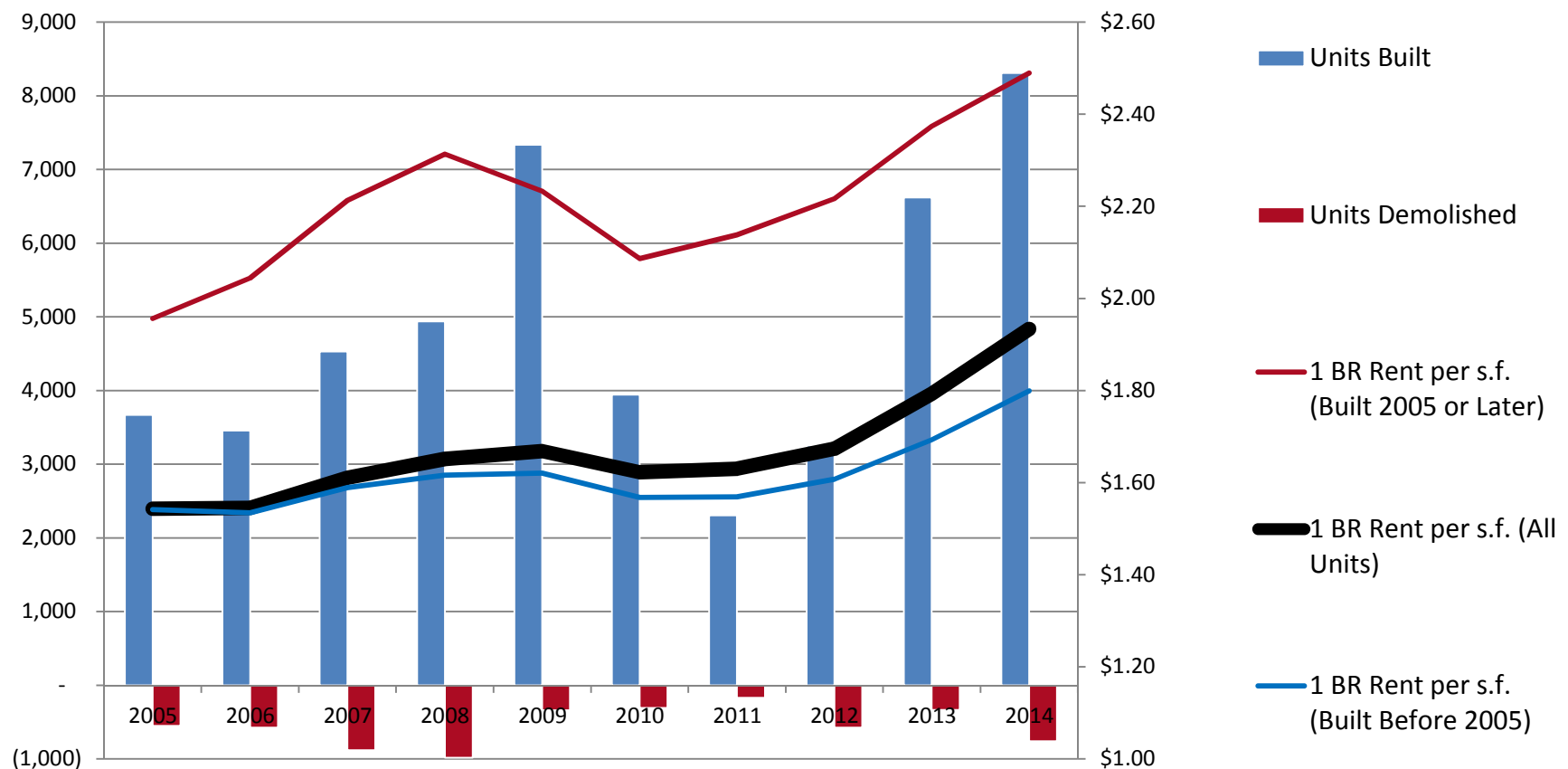


Source: U.S. Department of Housing & Urban Development, CHAS, 2006-2010 5-Year American Community Survey, Seattle city.



Rent Trends

In the last few years, housing development has accelerated, but rents continue to climb, driven by rapidly growing demand. Rental rates for new units are higher, and housing that is demolished tends to be older more affordable housing stock in varying conditions.



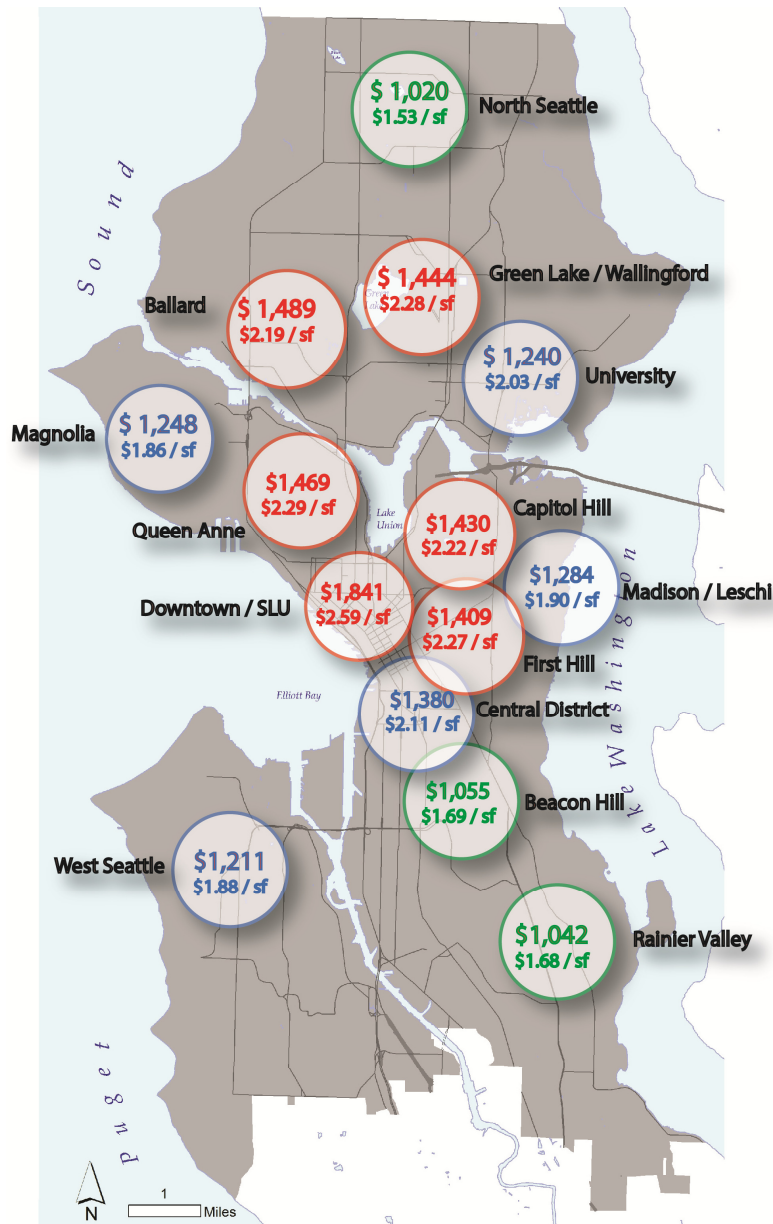
Sources: Seattle Residential Permit Report, DPD Permit Warehouse, 2014;
Dupre+Scott Apartment Advisors, Apartment Vacancy Report, 20+ unit buildings, Fall 2014, Seattle-14 market areas.



Average Rents by Sub-Market (1 Bedroom)

Average rents are highest in Downtown, and around Lake Union and the Ship Canal.

Average rents are most affordable in North Seattle, Rainier Valley, and Beacon Hill.



- \$1,400+
- \$1,200 - \$1,399
- \$1,000 - \$1,199

Dupre+Scott Apartment Advisors, Apartment Vacancy Report, 20+ unit buildings, Fall 2014, Seattle-14 market areas.



1-Bedroom Rents by Seattle Sub-Markets

Average rents are highest in Downtown and around Lake Union and the Ship Canal. Rents are lowest in North Seattle, Rainier Valley, and Beacon Hill.

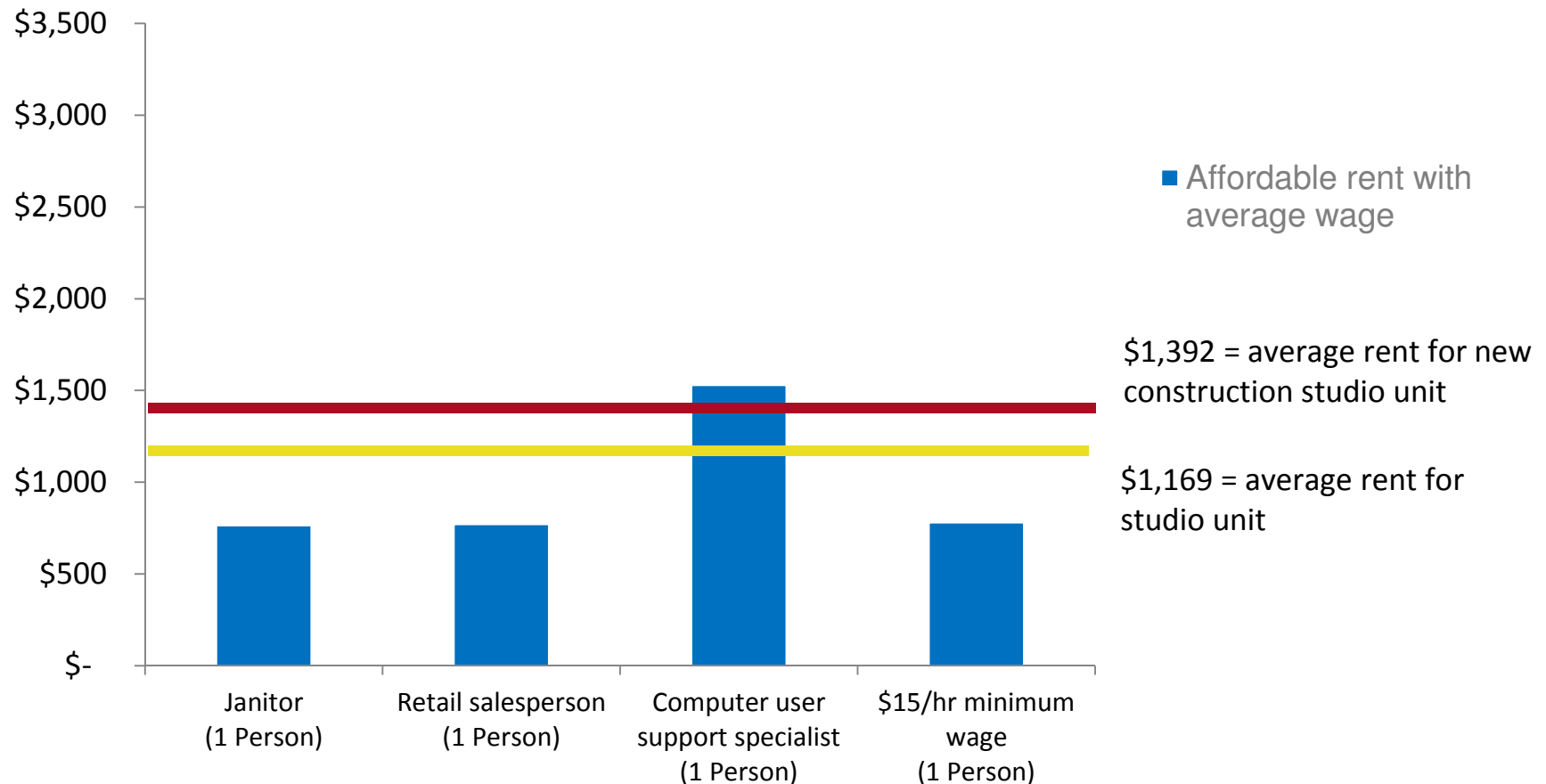
Market Area	Average Rent/Unit
Downtown, Belltown, South Lake Union	\$ 1,841
Ballard	\$ 1,489
Queen Anne	\$ 1,469
Greenlake/Wallingford	\$ 1,444
Capitol Hill, Eastlake	\$ 1,430
First Hill	\$ 1,409
Central	\$ 1,380
Madison/Leschi	\$ 1,284
Magnolia	\$ 1,248
University	\$ 1,240
West Seattle	\$ 1,211
Beacon Hill	\$ 1,055
Rainier Valley	\$ 1,042
North Seattle	\$ 1,020

Market Area	Avg. Rent/NRSF
Downtown, Belltown, South Lake Union	\$ 2.59
Queen Anne	\$ 2.29
Greenlake/Wallingford	\$ 2.28
First Hill	\$ 2.27
Capitol Hill, Eastlake	\$ 2.22
Ballard	\$ 2.19
Central	\$ 2.11
University	\$ 2.03
Madison/Leschi	\$ 1.90
Magnolia	\$ 1.86
West Seattle	\$ 1.86
Beacon Hill	\$ 1.69
Rainier Valley	\$ 1.68
North Seattle	\$ 1.53



Housing Affordability for Working Households – Studios

Average rent for studio apartments in Seattle is not affordable to people working in some of the region's most common occupations.

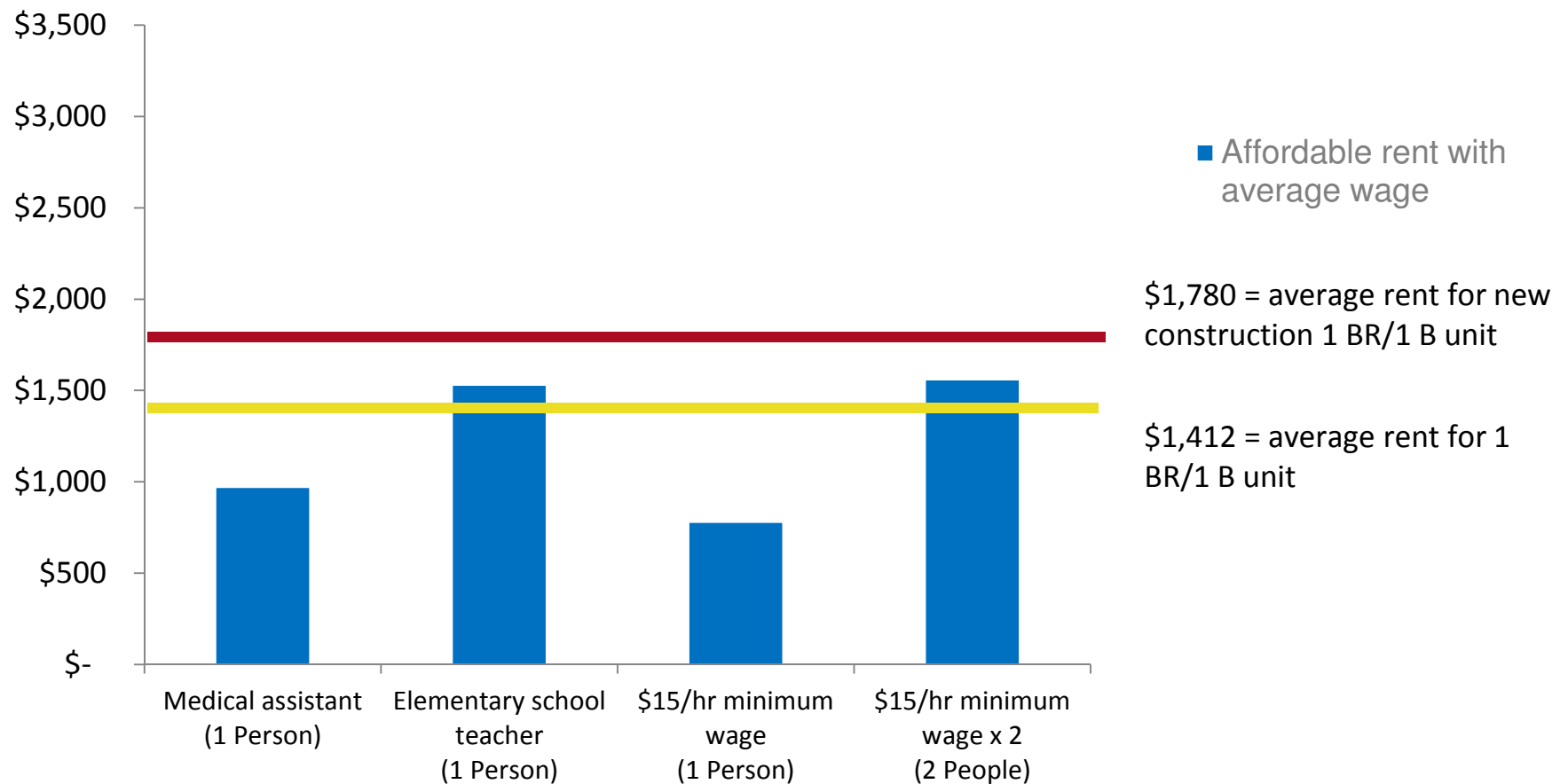


Sources: Dupre+Scott Apartment Advisors, Apartment Vacancy Report, 20+ unit buildings, Fall 2014, Seattle-14 market areas; WA Employment Security Department, Occupational Employment & Wage Estimates, Seattle-Bellevue-Everett, WA MD, 2014.



Housing Affordability for Working Households – 1 Bedrooms

Average rent for 1 bedroom apartments in Seattle is not affordable to people working in some of the region's most common occupations.

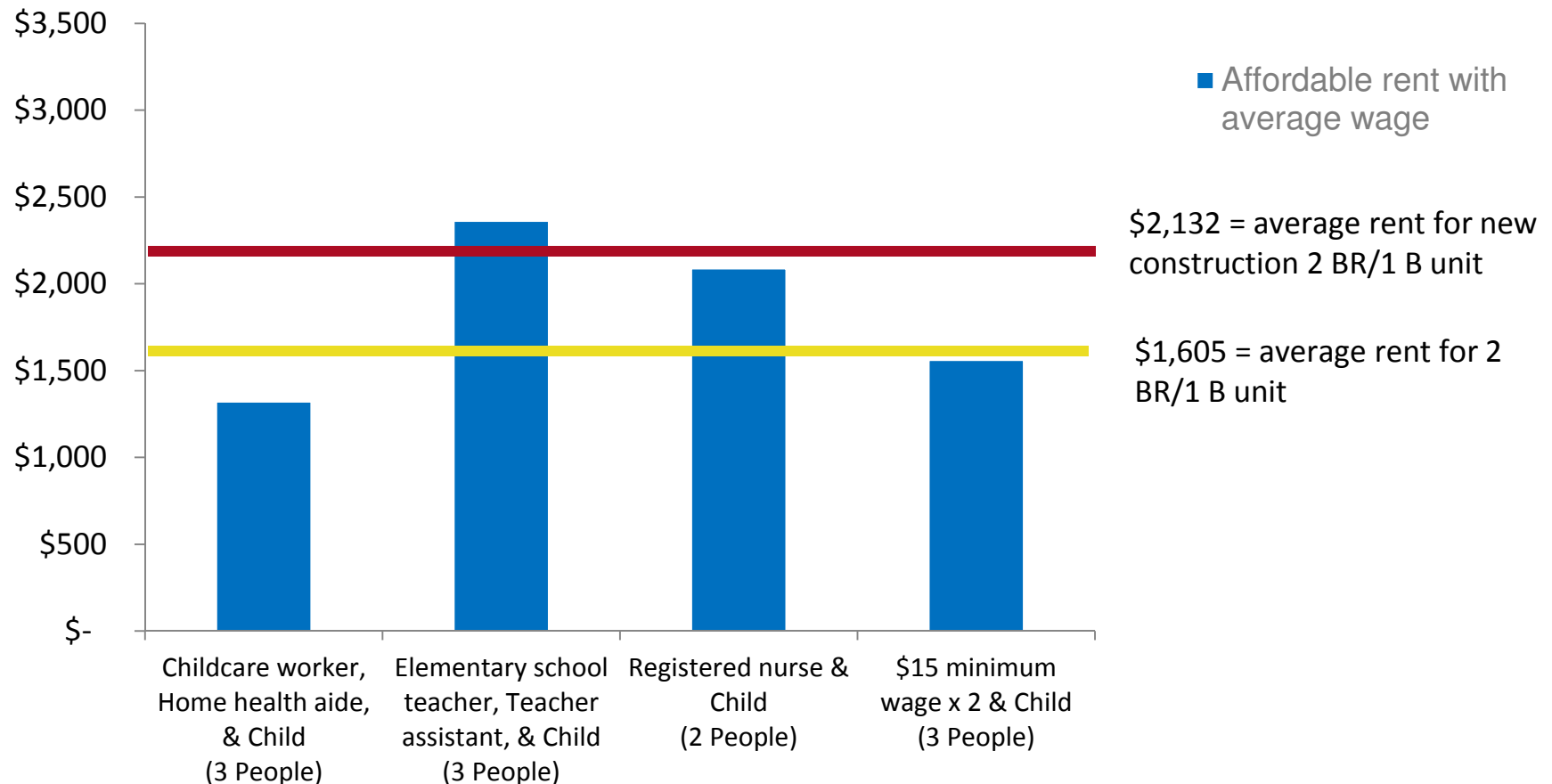


Sources: Dupre+Scott Apartment Advisors, Apartment Vacancy Report, 20+ unit buildings, Fall 2014, Seattle-14 market areas; WA Employment Security Department, Occupational Employment & Wage Estimates, Seattle-Bellevue-Everett, WA MD, 2014.



Housing Affordability for Working Households – 2 BR/2 B

Average rent for 2 bedroom/1 bath apartments in Seattle is not affordable to families with wage earners in some of the region's most common occupations.

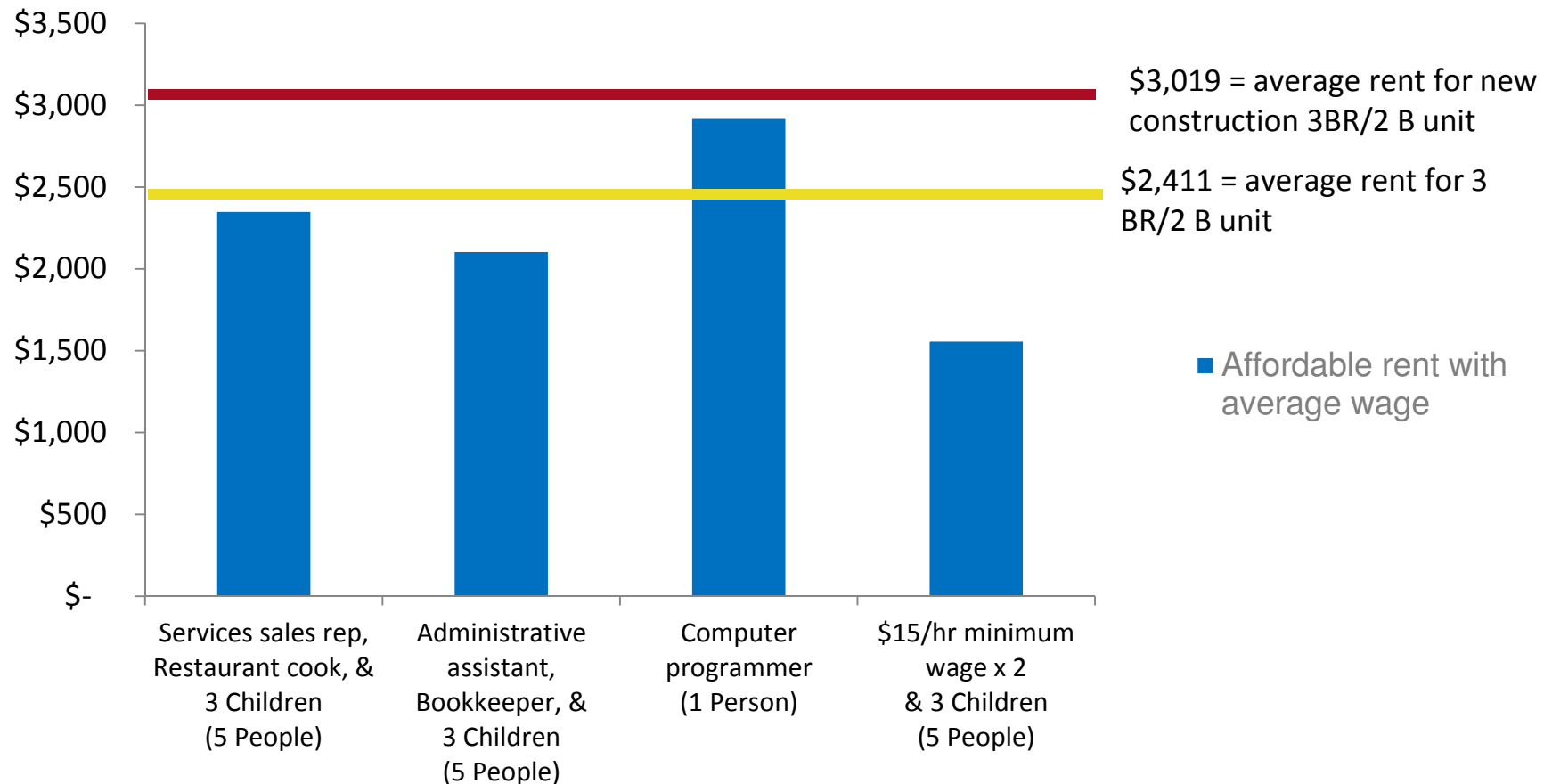


Sources: Dupre+Scott Apartment Advisors, Apartment Vacancy Report, 20+ unit buildings, Fall 2014, Seattle-14 market areas; WA Employment Security Department, Occupational Employment & Wage Estimates, Seattle-Bellevue-Everett, WA MD, 2014.



Housing Affordability for Working Households – 3 BR/2 B

Average rent for 3 bedroom/2 bath apartments in Seattle is not affordable to families with wage earners in some of the region's most common occupations.

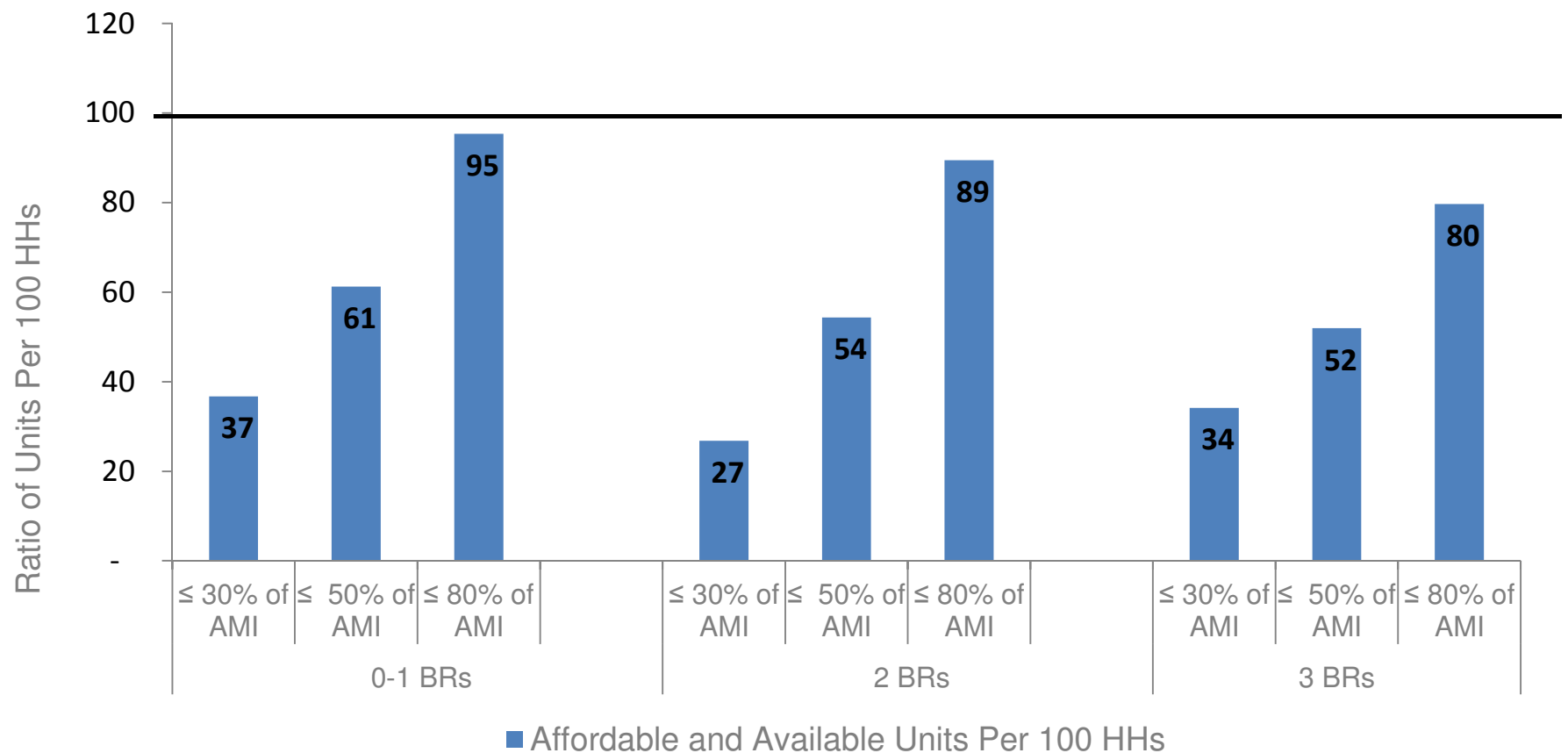


Sources: Dupre+Scott Apartment Advisors, Apartment Vacancy Report, 20+ unit buildings, Fall 2014, Seattle-14 market areas; WA Employment Security Department, Occupational Employment & Wage Estimates, Seattle-Bellevue-Everett, WA MD, 2014.



Rental Housing Affordability & Availability by Unit Size

Low and moderate income families face significant challenges in finding affordable and available rental housing with more than 1 bedroom.



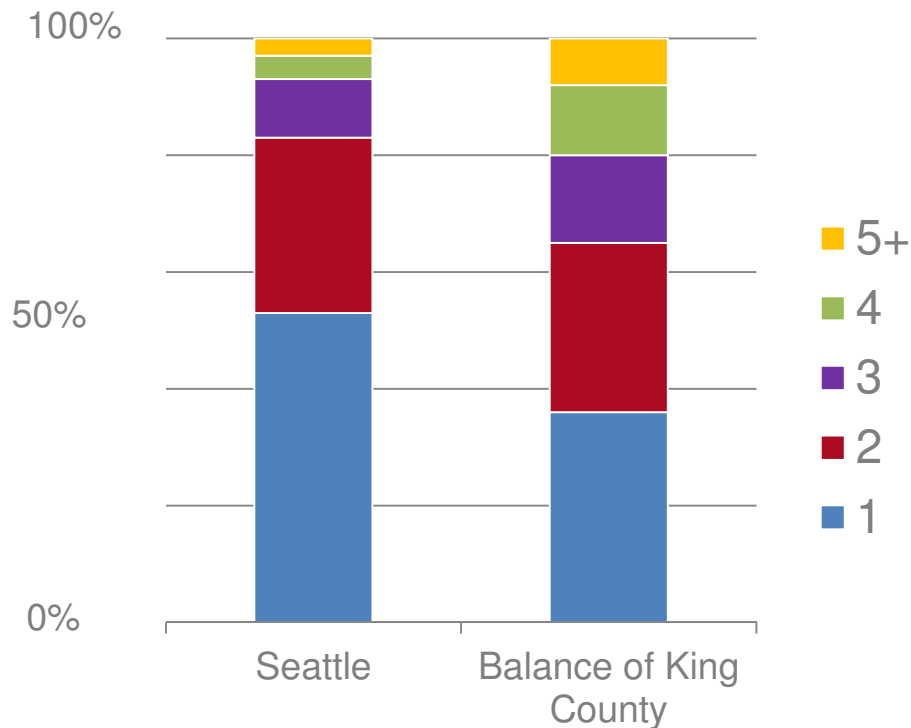
Source: U.S. Housing & Urban Development, CHAS, 2006-2010 5-Year American Community Survey, Seattle city.



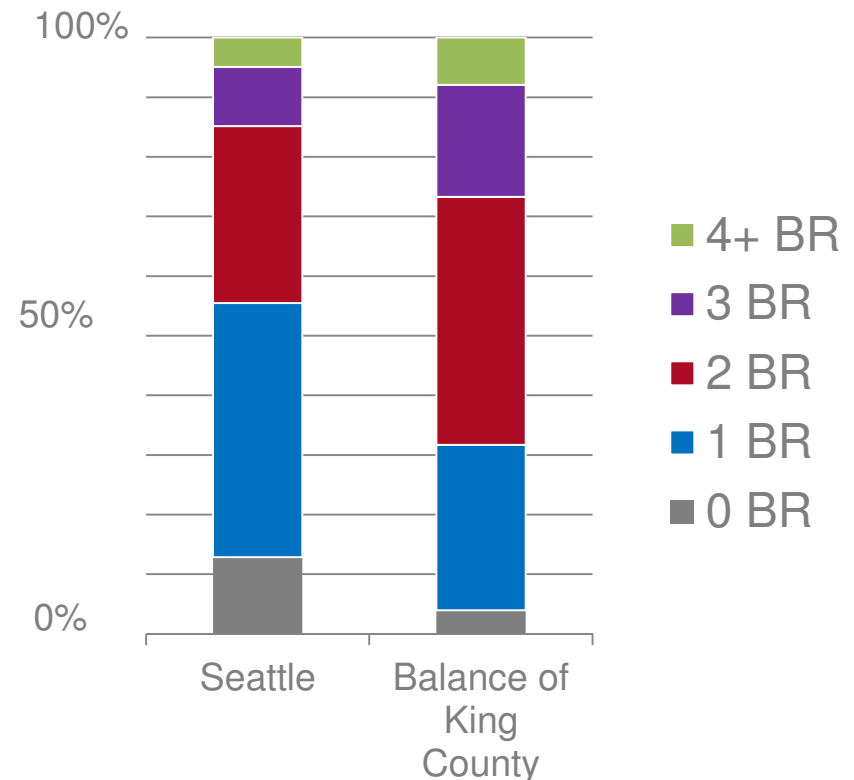
Households Size and Rental Unit Size

This comparison suggests that Seattle and King County have a sufficient supply of large units. However, it does not take into account affordability or reflect the degree to which larger units are occupied by smaller size households.

Household Size



Unit Size

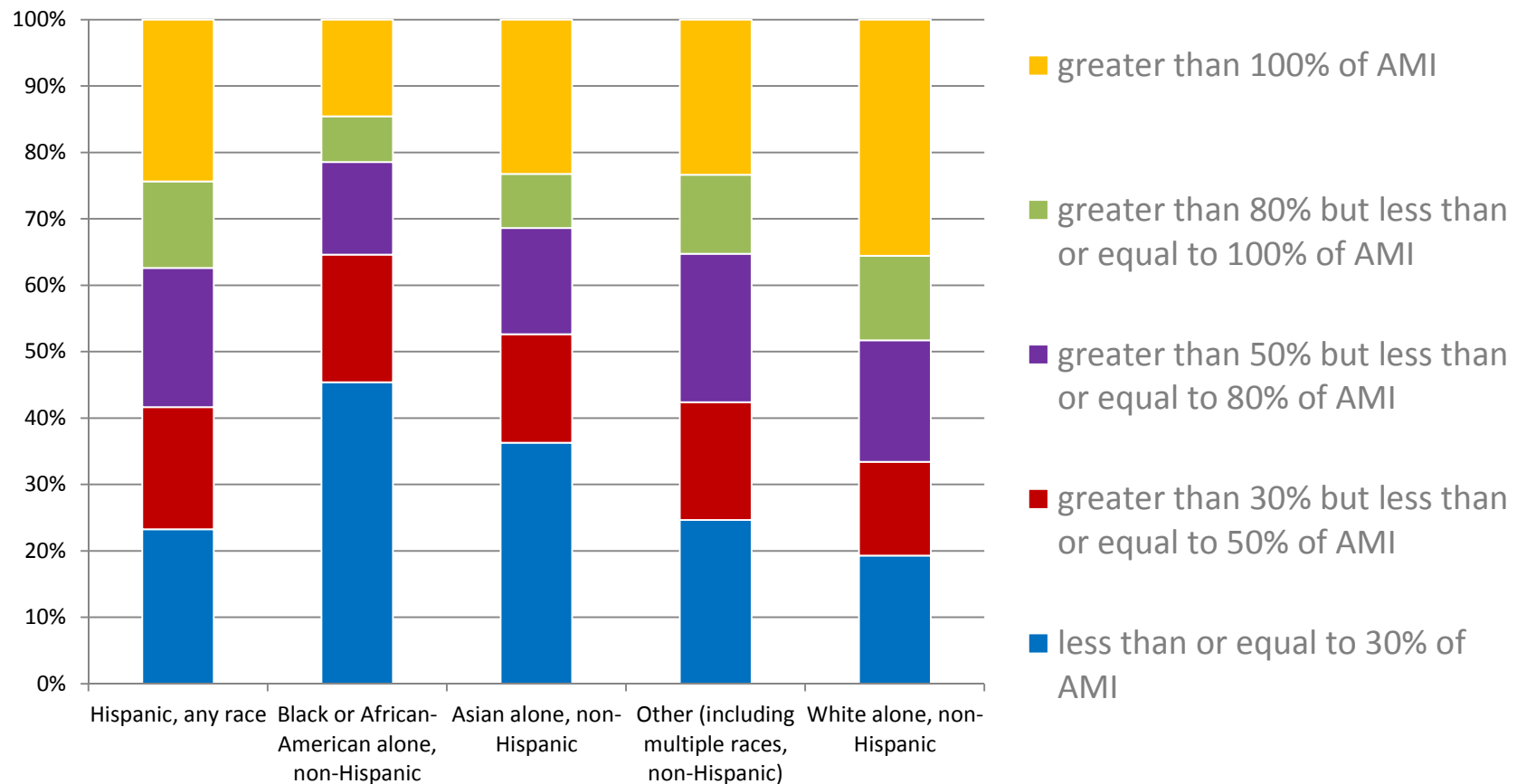


Source: U.S. Census Bureau, 2008-2012 5-Year American Community Survey, Seattle city



Race/Ethnicity by Income – Renter Households

Renter households of color, especially Black/African Americans, have incomes disproportionately $\leq 30\%$ of area median income.

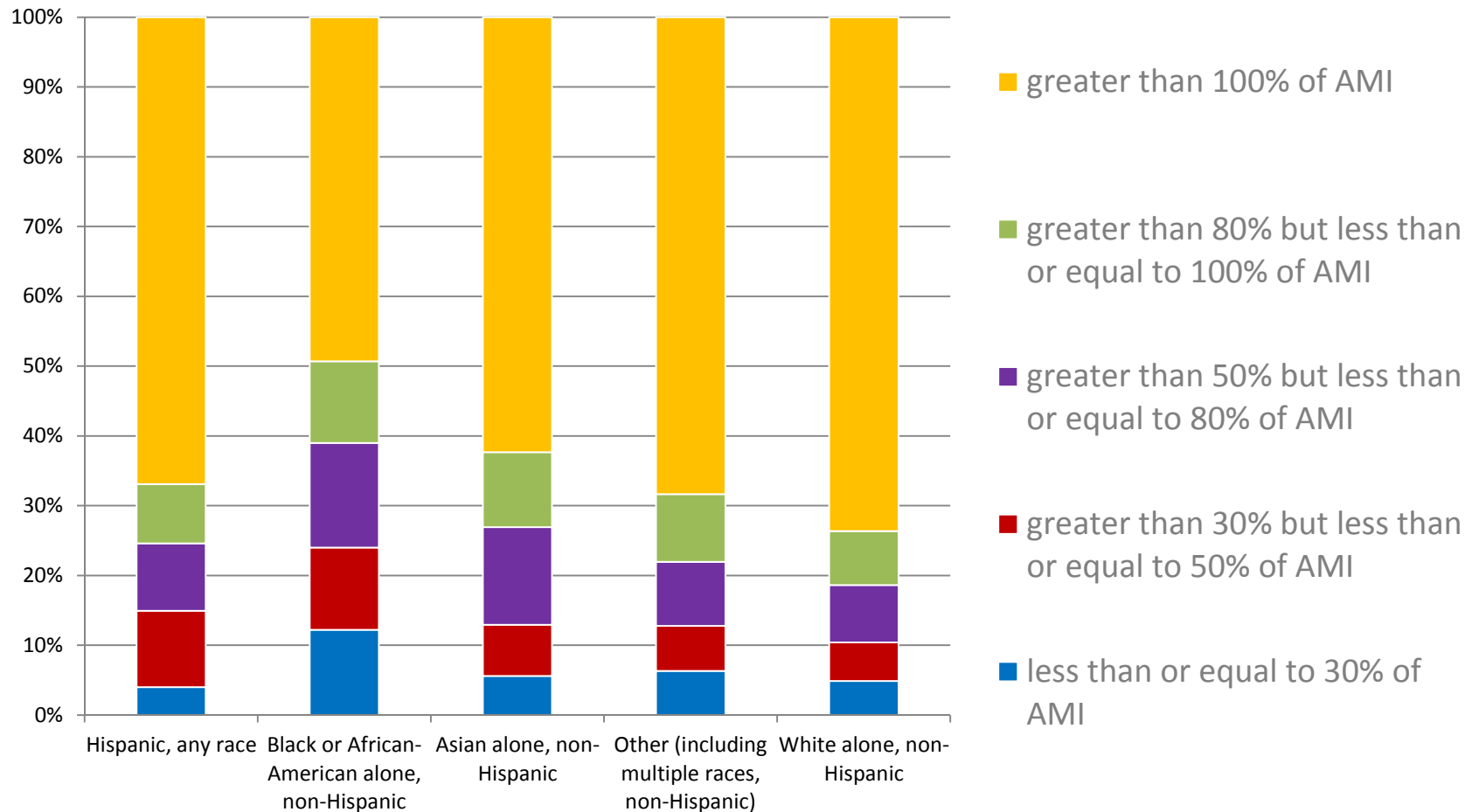


Source: U.S. Department of Housing & Urban Development, CHAS, 2006-2010 5-Year American Community Survey, Seattle city



Race/Ethnicity by Income – Owner Households

Black/African American homeowner households have incomes disproportionately $\leq 80\%$ of area median income.



Source: U.S. Department of Housing & Urban Development, CHAS, 2006-2010 5-Year American Community Survey, Seattle city



Seattle Office of Civil Rights 2014 Fair Housing Testing Preliminary Findings

64% of all tests showed evidence of different treatment.



42 tests focused on **Race** - **64%** showed patterns that generally favored white testers.



..... **31** tests focused on **Sexual Orientation** - **61%** showed evidence of different treatment



..... **43** tests focused on **National Origin** - **67%** showed evidence of different treatment

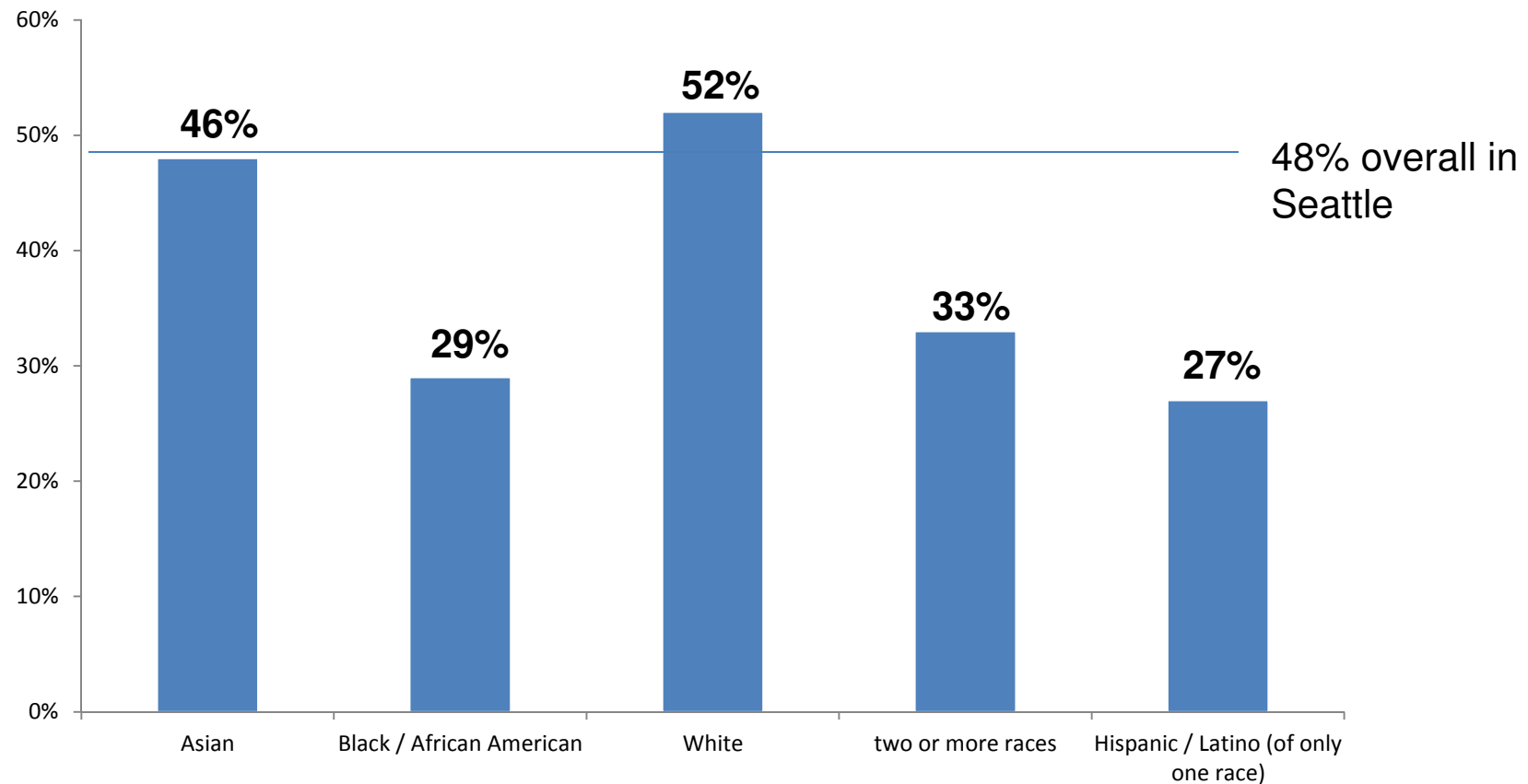


..... **9** tests focused on **Gender Identity** - **67%** showed evidence of different treatment



Homeownership Rates by Major Racial Category and Hispanic/Latino Ethnicity

Homeownership rates for Black/African American, Hispanic/Latino and mixed race households are significantly lower than for Asian and White households.

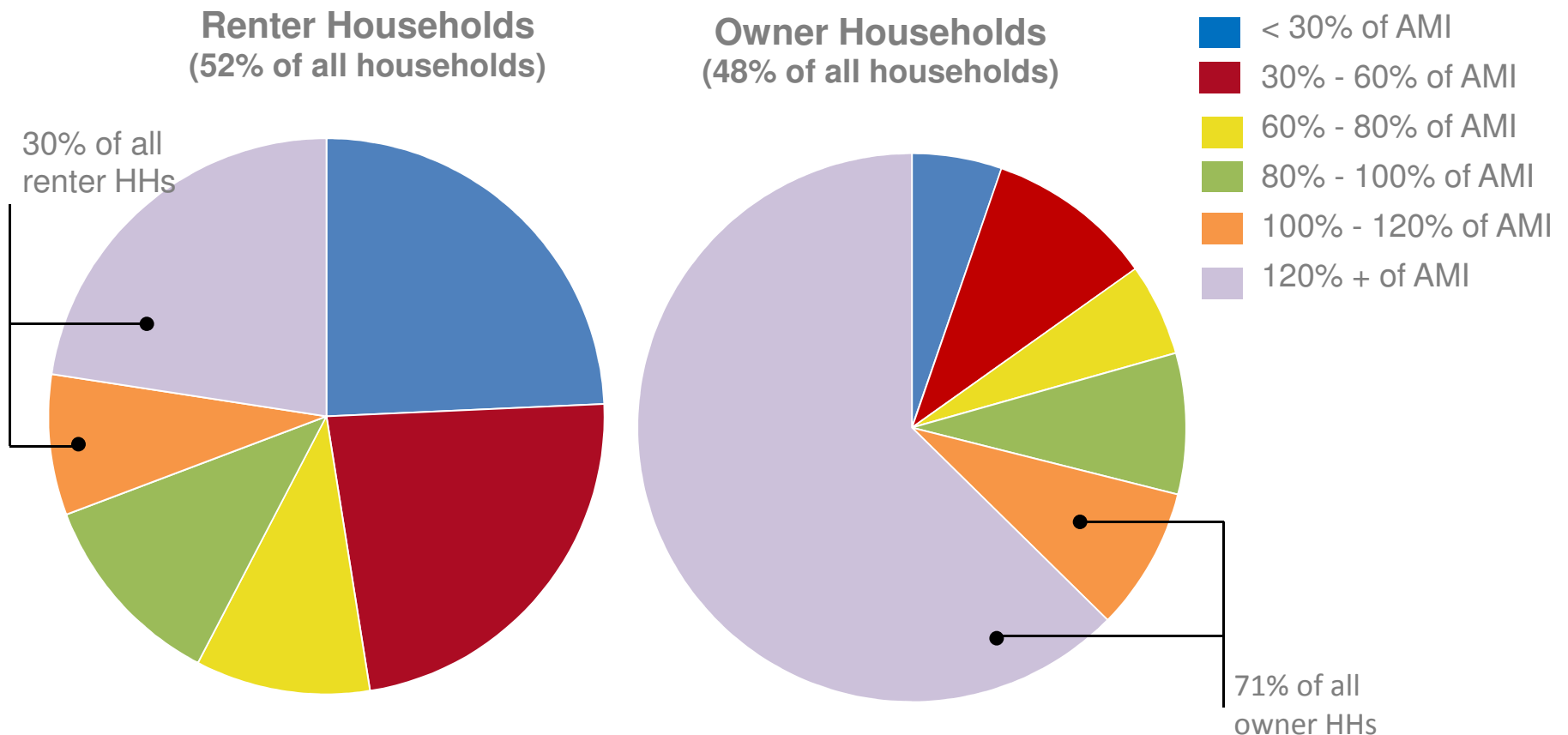


Source: US Census. 2010 decennial Census.



Seattle Households by Income – Owners & Renters

Renter households have a greater diversity of incomes, including an estimated 30% with incomes greater than 100% of AMI. Nearly three-quarters of owner households have incomes greater than 100% of AMI.



Source: U.S. Department of Housing & Urban Development, CHAS 2006-2010 5-Year American Community Survey, Seattle city.



Housing Needed to Accommodate Growth by Income Level

An incomplete look

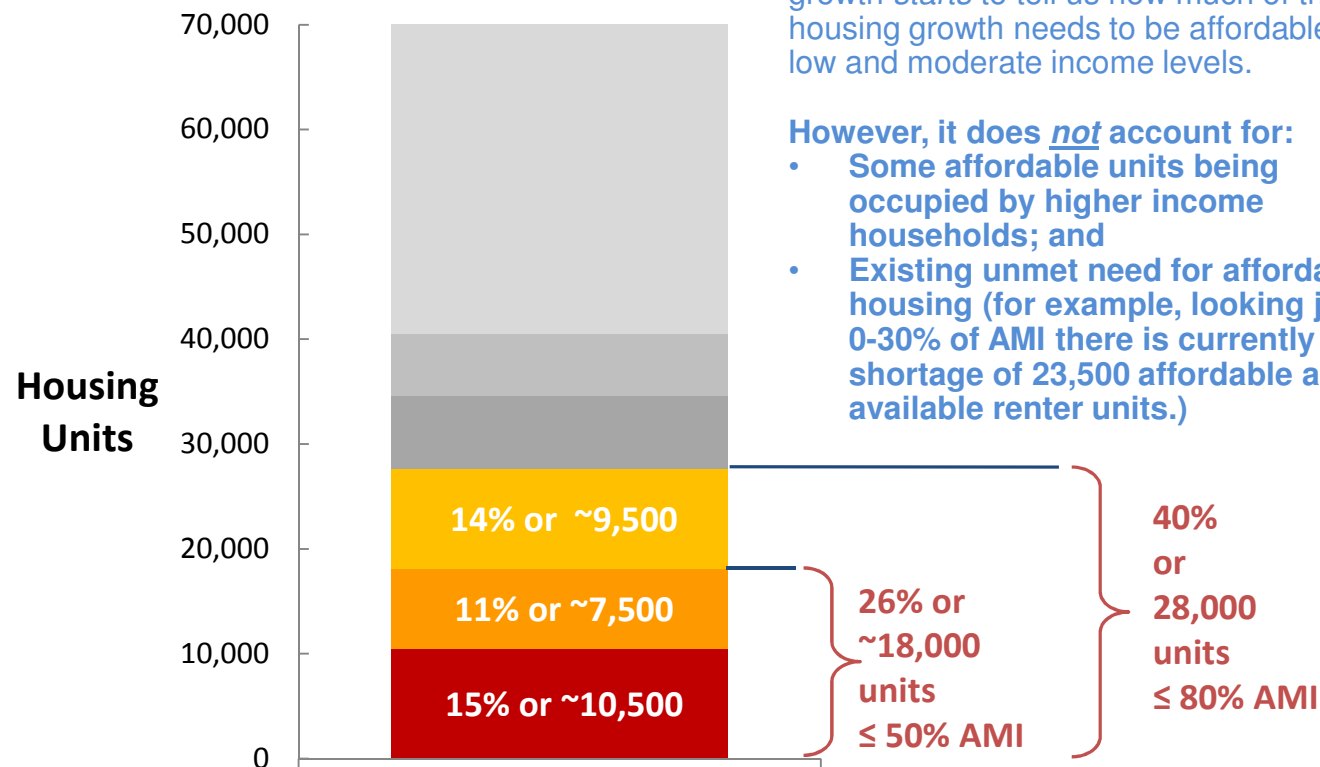
Overlaying today's income distribution on growth *starts* to tell us how much of the housing growth needs to be affordable at low and moderate income levels.

However, it does not account for:

- Some affordable units being occupied by higher income households; and
- Existing unmet need for affordable housing (for example, looking just at 0-30% of AMI there is currently a shortage of 23,500 affordable and available renter units.)

Income bands:

- > 120% of AMI
- 100-120% of AMI
- 80-100% of AMI
- 50-80% of AMI
- 30-50% of AMI
- 0-30% of AMI



Sources: U.S. Housing & Urban Development, CHAS, 2006-2010 5-Year American Community Survey, Seattle city; Seattle 2035 Updating Seattle's Comprehensive Plan, Background Report, February 2014.



Age of Housing Stock

Over a quarter of the City's existing housing stock was built before 1940.

Year Built	Housing Units	Percentage
2010 or later	<i>About 16,000</i>	5%
2000-2009	47,861	15%
1990-1999	24,861	8%
1980-1989	23,566	7%
1970-1979	27,914	9%
1960-1969	28,424	9%
1950-1959	35,267	11%
1940-1949	29,441	9%
1939 or earlier	88,279	27%

Source: U.S. Census Bureau, 2011-2013 3-Year American Community Survey, Seattle city.

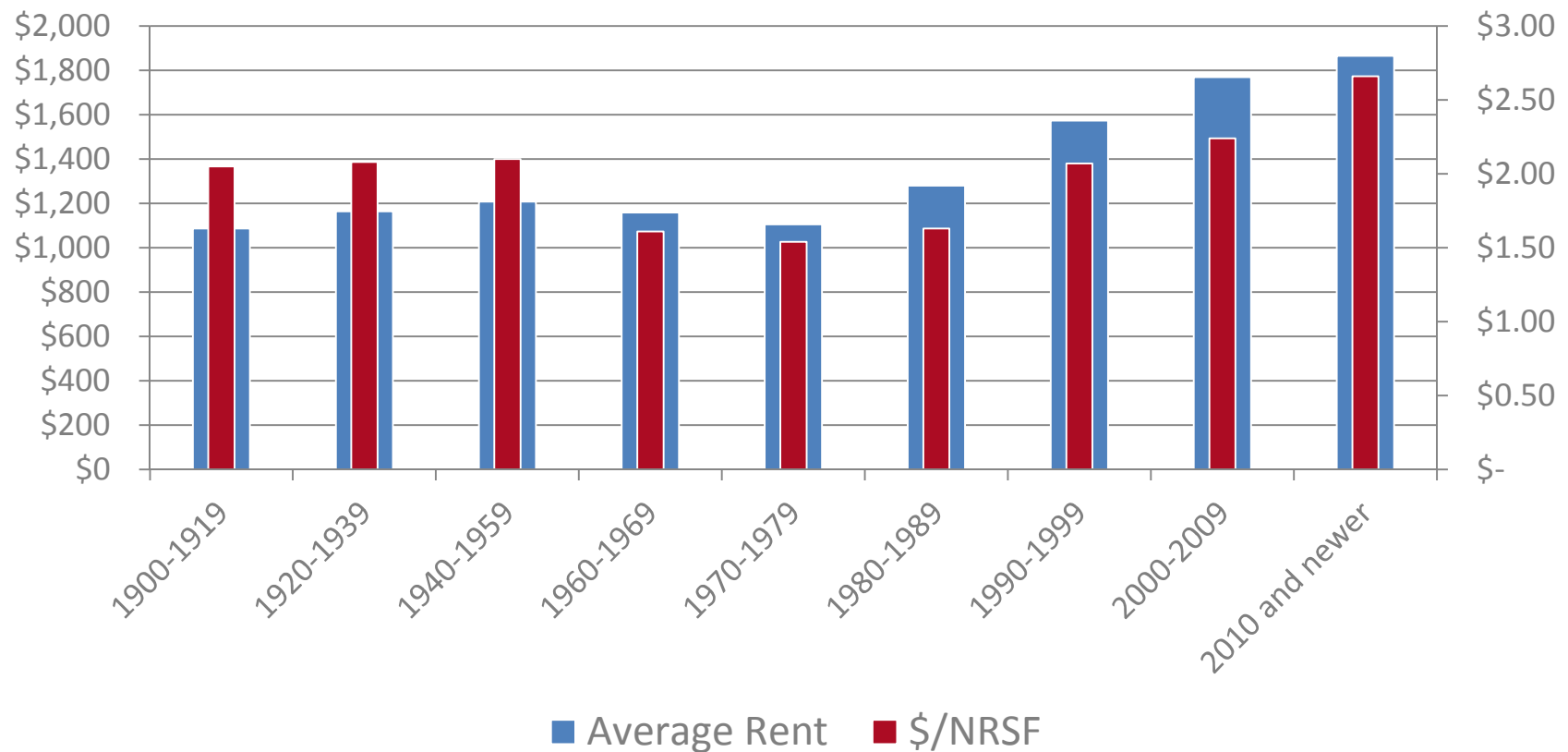
Housing Affordability & Livability Agenda

City of Seattle

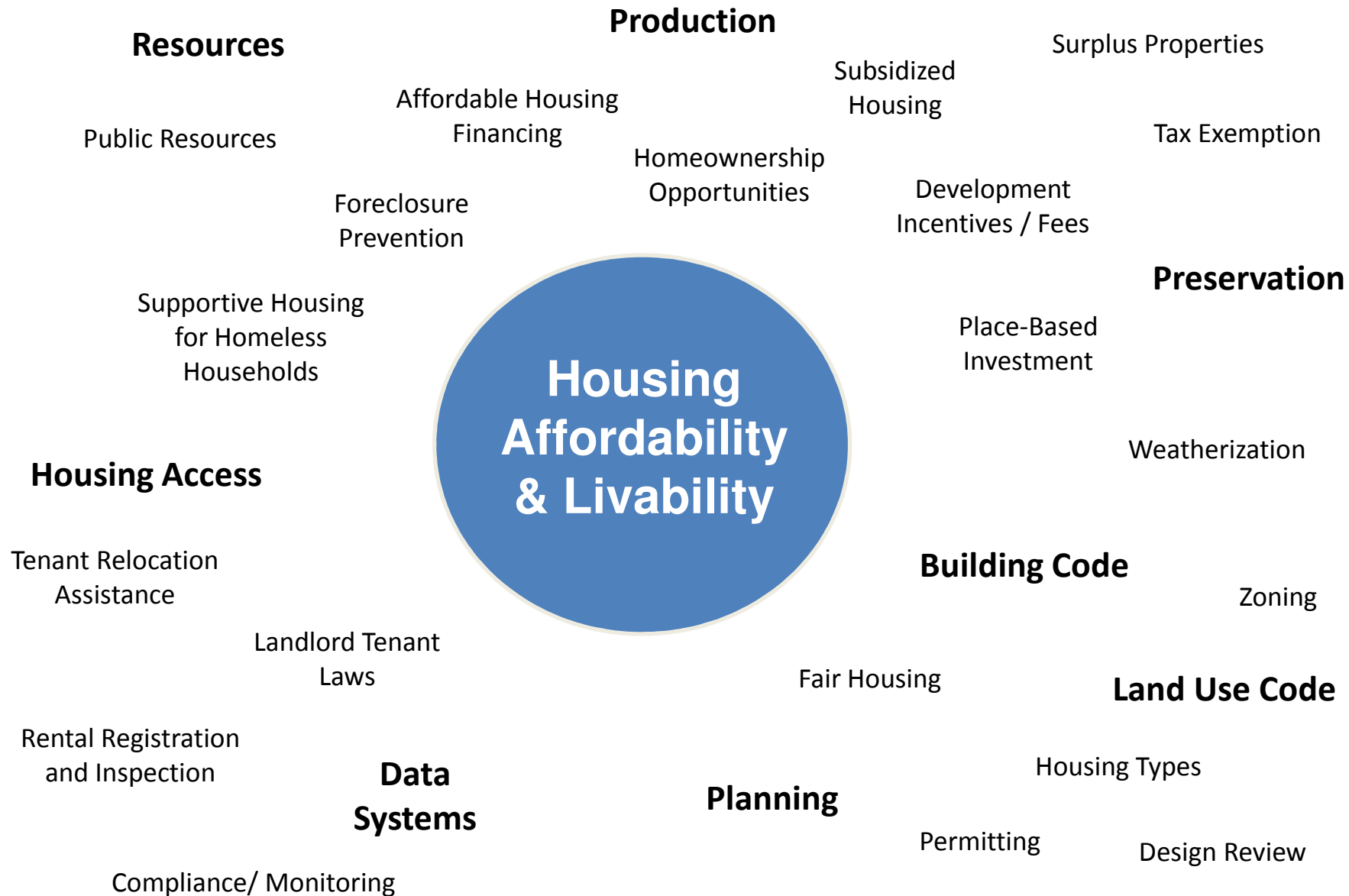


Age of Apartment Buildings & Rents

Seattle's least expensive rental housing stock was built in the 1960s and 1970s.



Sources: Dupre+Scott Apartment Advisors, Apartment Vacancy Report, 20+ unit buildings, Spring 2015, Seattle-14 market areas.





Department of Planning & Development – Programs

PLANNING

Comprehensive Planning

- Area Planning
- Land Use Code (Zoning) Changes

LAND USE & ENVIRONMENTAL REGULATION

Land Use Permitting (MUP)

- Design Review
- Environmental & Shoreline Regulations (SEPA , SMP etc.)

REGULATION OF CONSTRUCTION

Building Permits (Building Code & Residential Code)

- Fire & Life Safety

CODE COMPLIANCE

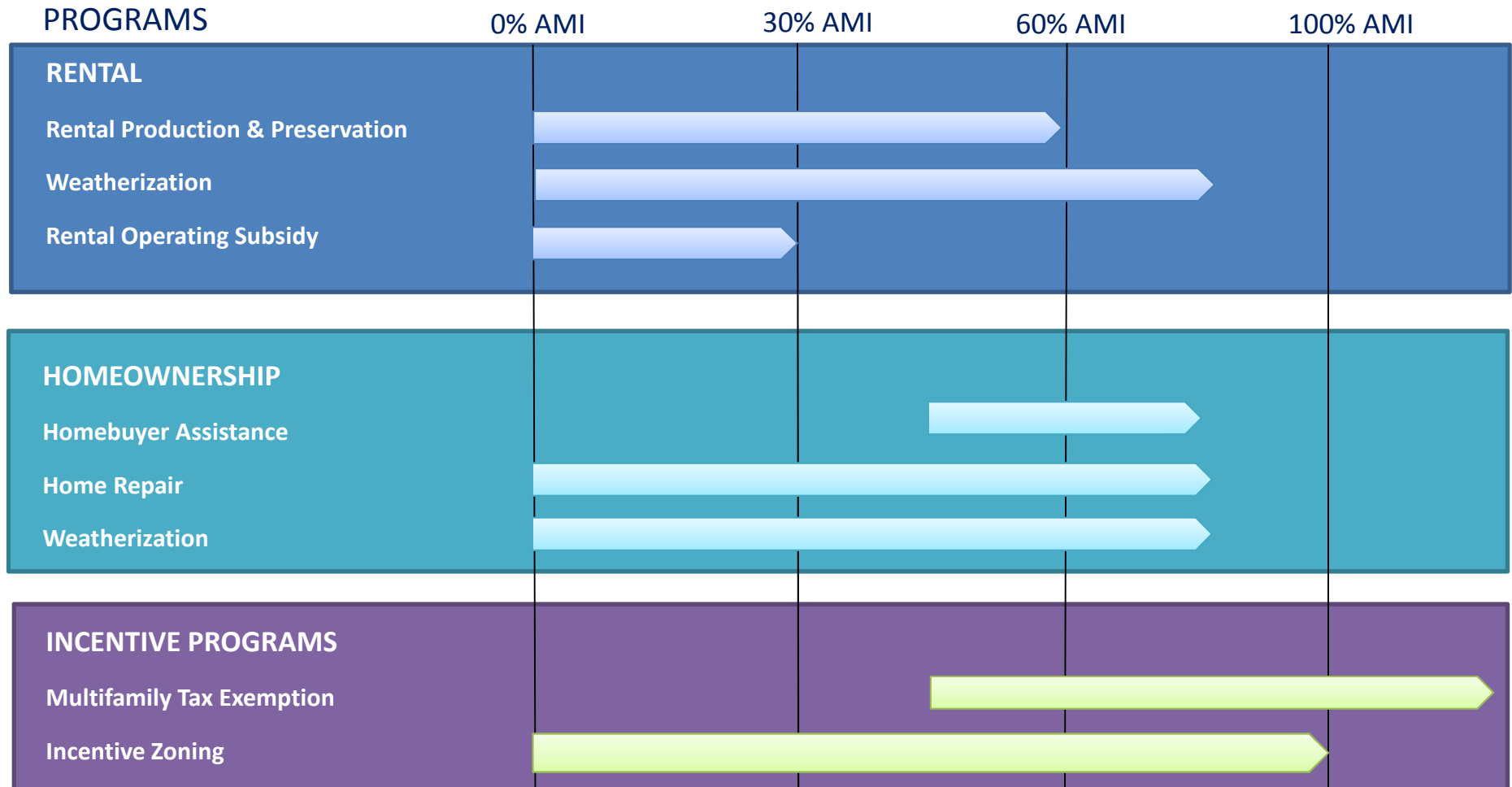
Tenant Relocation Assistance Ordinance (TRAO)

Housing Building and Maintenance Code (and Land Use Code) Enforcement

Rental Registration and Inspection Ordinance (RRIO) Program

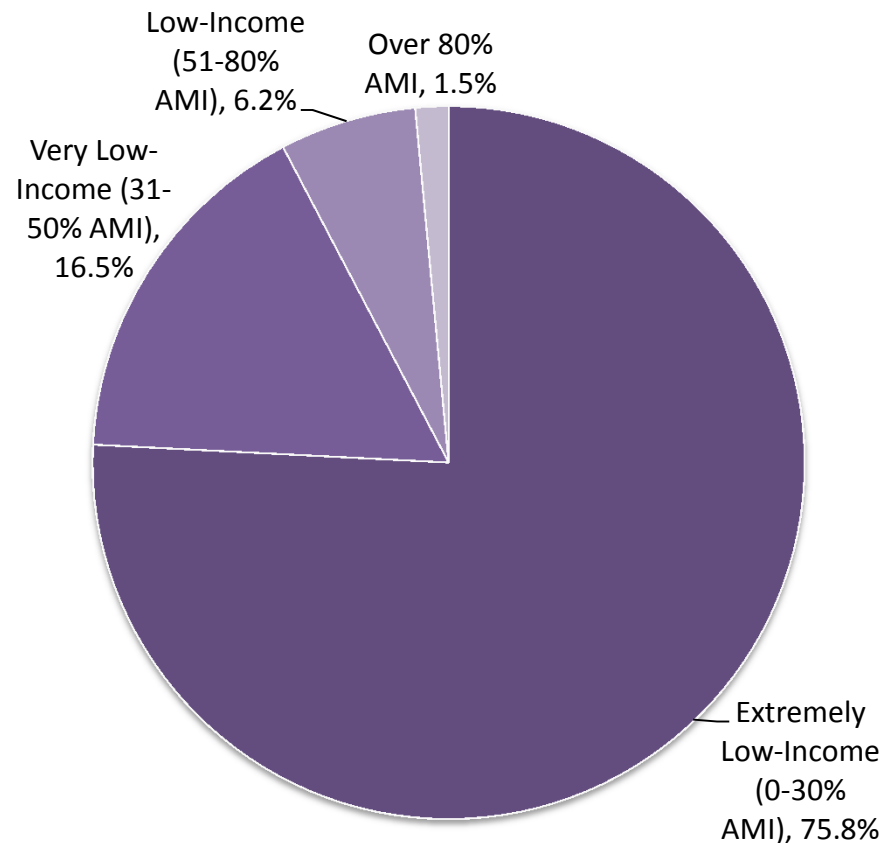


Office of Housing Programs – Target Income Ranges





Office of Housing – Rental Housing Program Households Living in Income-Restricted Units, by Income

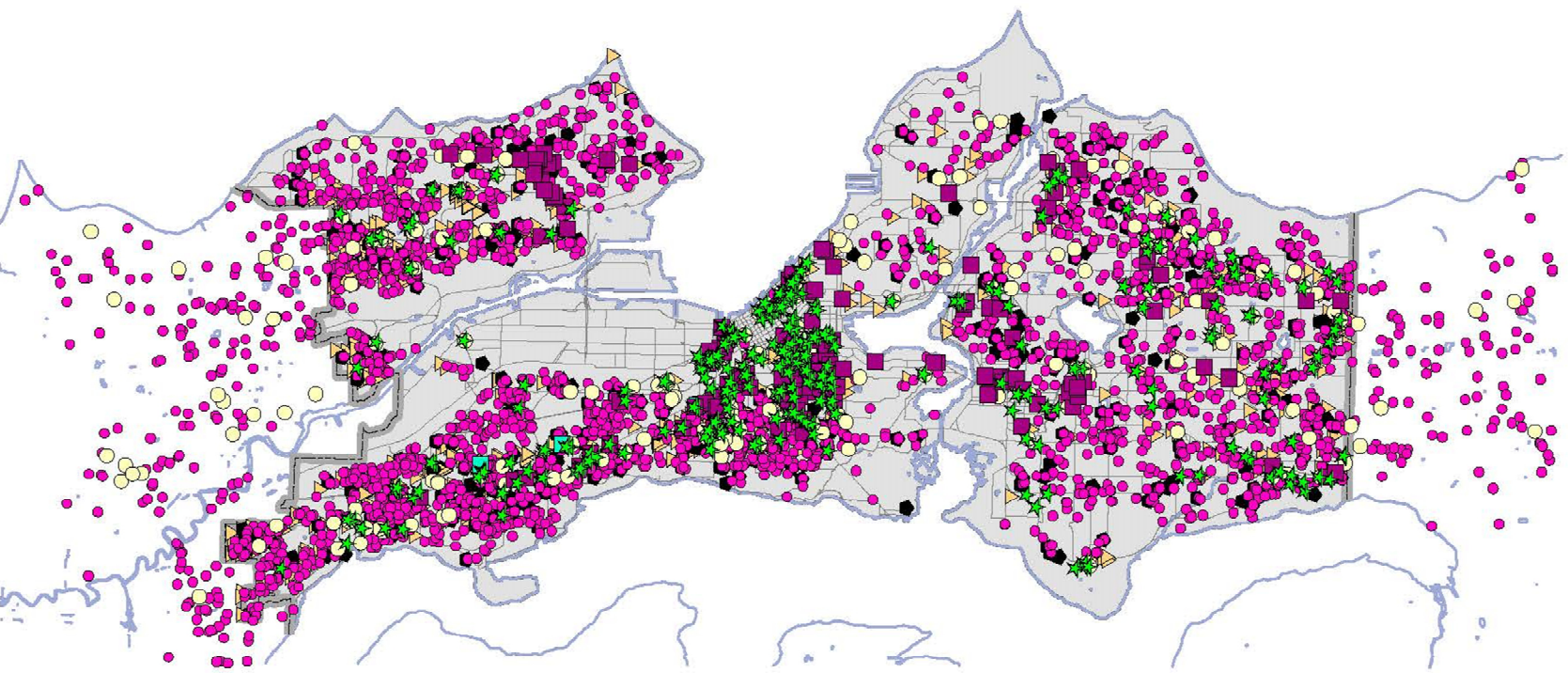


Projects in Operation and Reporting as of 12/31/13	Number of Households by Income	Percent of Households	Units by Income Restriction	Percent of Units
Extremely Low-Income (0-30% AMI)	10,375	75.8%	5,630	51.9%
Very Low-Income (31-50% AMI)	2,253	16.5%	3,286	30.3%
Low-Income (51-80% AMI)	853	6.2%	1,560	14.4%
Over 80% AMI	209	1.5%	374*	3.4%
Total	13,690	100%	10,850	100%

**"Over 80% AMI" represents units in OH-funded projects that are restricted by other funders.*

City of Seattle Office of Housing Portfolio

This map shows where households have benefited from OH's Rental Housing Program, Home Repair Loan Program, Homebuyer Assistance Program, Multifamily Property Tax Exemption Program, and Homewise Weatherization Program.



Program Activity

- ★ Rental Housing Program
- Rental MFTE
- Owner MFTE
- Rental Weatherization
- Owner Weatherization
- ◆ Home Repair
- ▲ Homebuyer Assistance

Source : City of Seattle
Office of Housing
October 2014



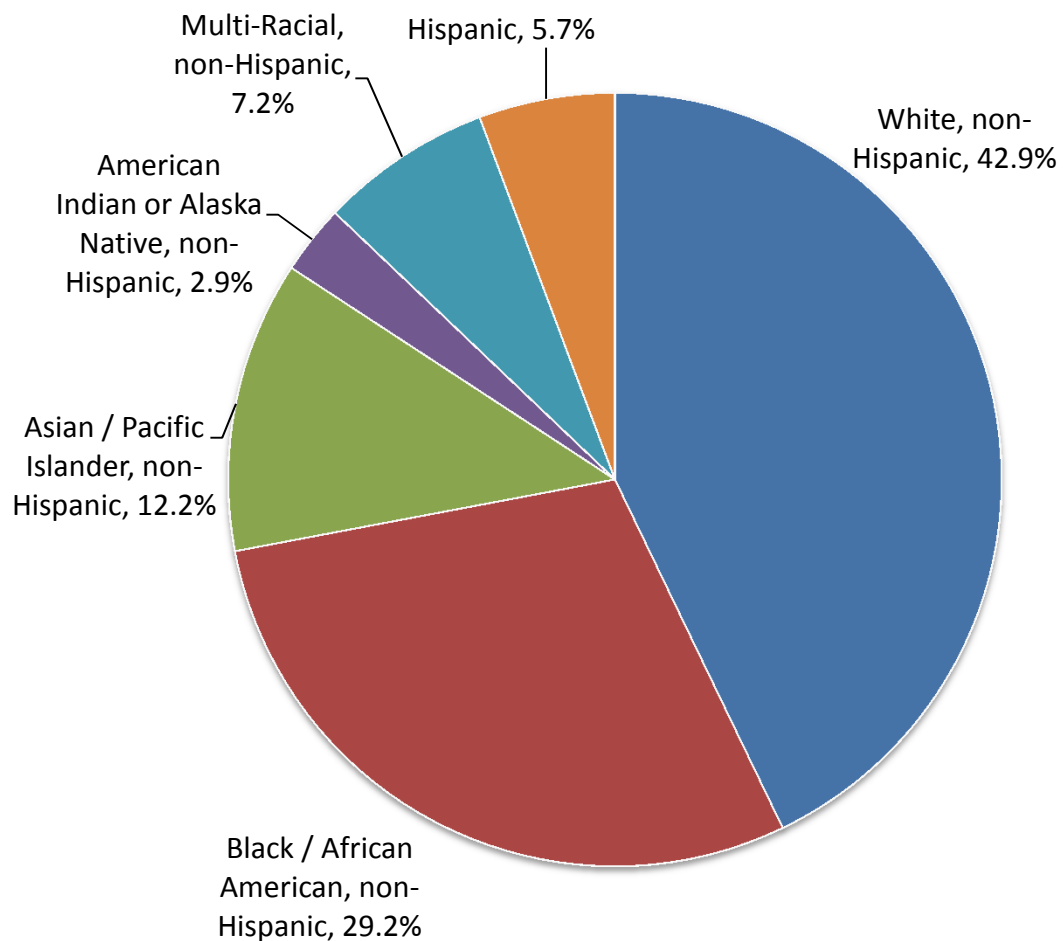
0 0.5 1 2 3
Miles

2014 City of Seattle

No warranties of any sort, including accuracy, fitness or merchantability, accompany this product.



Office of Housing – Rental Housing Program Households Living in OH Income-Restricted Units, by Race/Ethnicity



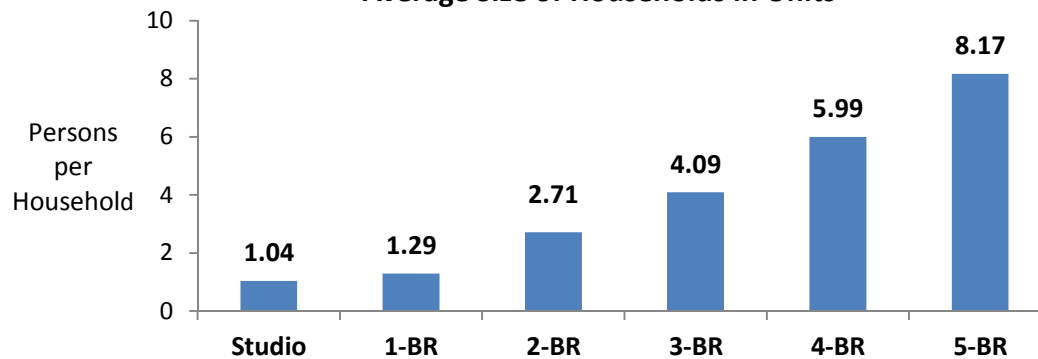
Race / Ethnicity	Number of Households	Percent of Total
White, non-Hispanic	5,595	42.9%
Black / African American, non-Hispanic	3,817	29.2%
Asian / Pacific Islander, non-Hispanic	1,587	12.2%
American Indian or Alaska Native, non-Hispanic	378	2.9%
Multi-Racial, non-Hispanic	935	7.2%
Hispanic	741	5.7%
Total Households Reporting Race/Ethnicity in 2013	13,053	100.0%

Source: Office of Housing, Annual Report Data, 2013



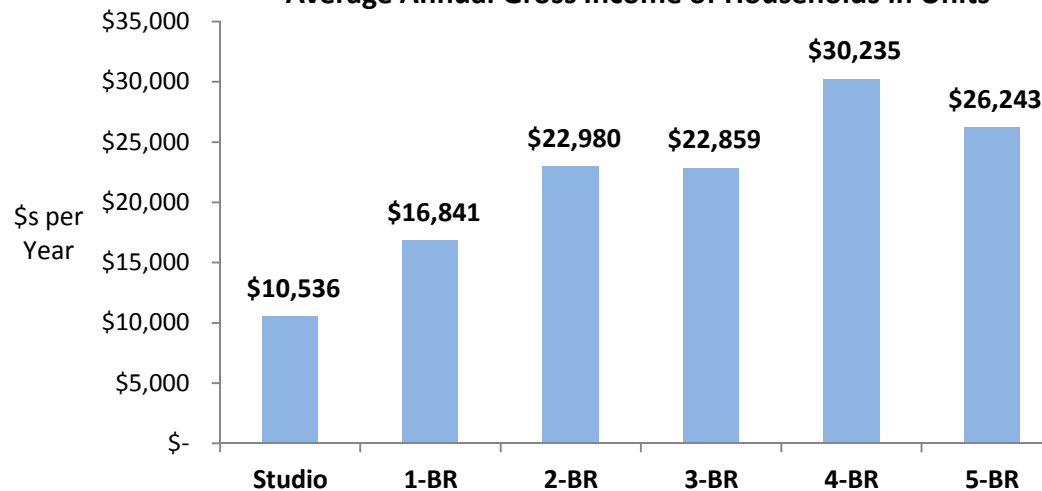
Office of Housing – Rental Housing Program Households Living in Income-Restricted Units, by Average Size and Income of Households

Average Size of Households in Units



Unit Type	Average Size of Households
Studio	1.04
1-Bedroom	1.29
2-Bedroom	2.71
3-Bedroom	4.09
4-Bedroom	5.99
5-Bedroom	8.17

Average Annual Gross Income of Households in Units

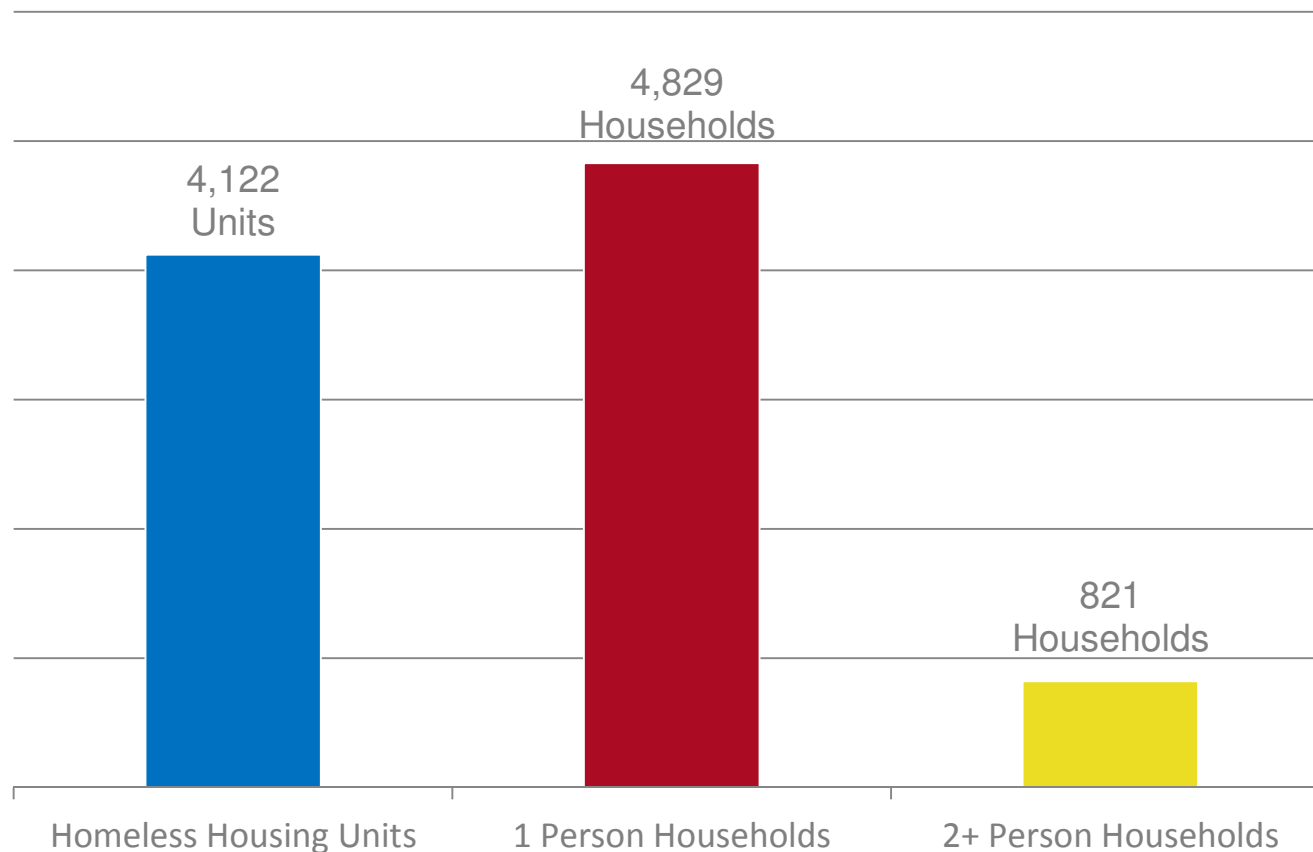


Unit Type	Average Annual Income of Households	Income of Households as % of Area Median Income
Studio	\$10,536	17%
1-Bedroom	\$16,841	26%
2-Bedroom	\$22,980	30%
3-Bedroom	\$22,859	29%
4-Bedroom	\$30,235	31%
5-Bedroom	\$26,243	22%

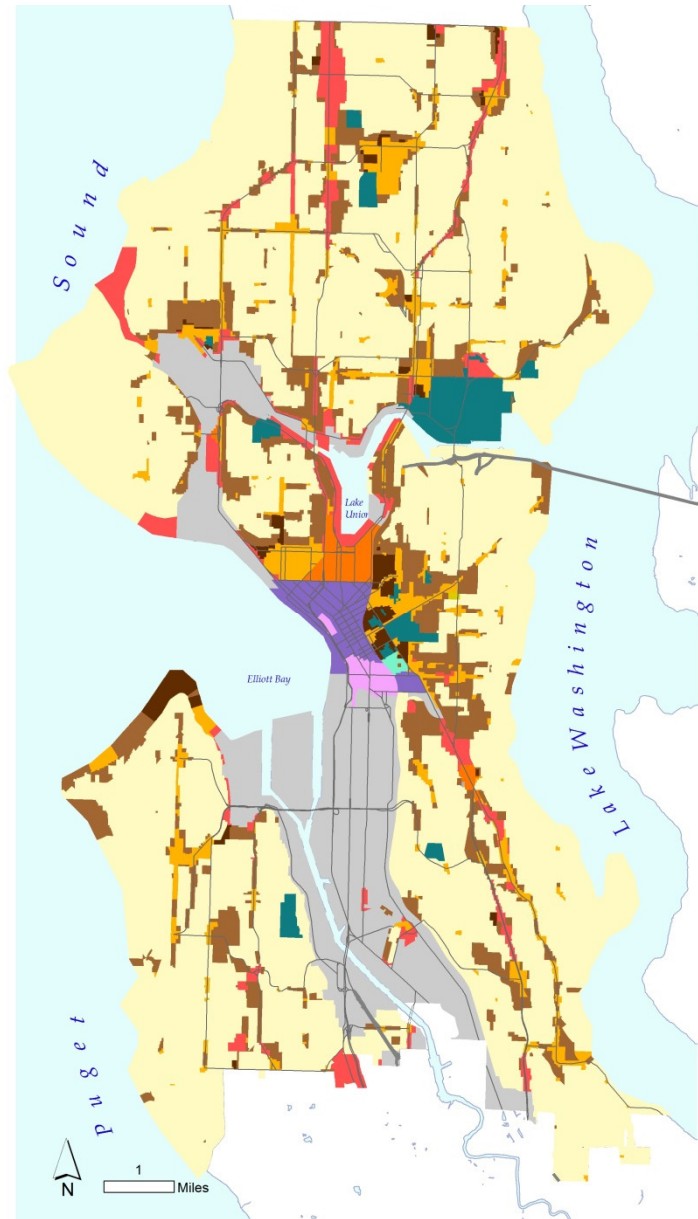
Source: Office of Housing, 2013 Annual Report Data



Office of Housing – Rental Housing Program Homeless Housing and Households Served



Source: Office of Housing, Annual Report Data, 2013



Existing Zoning

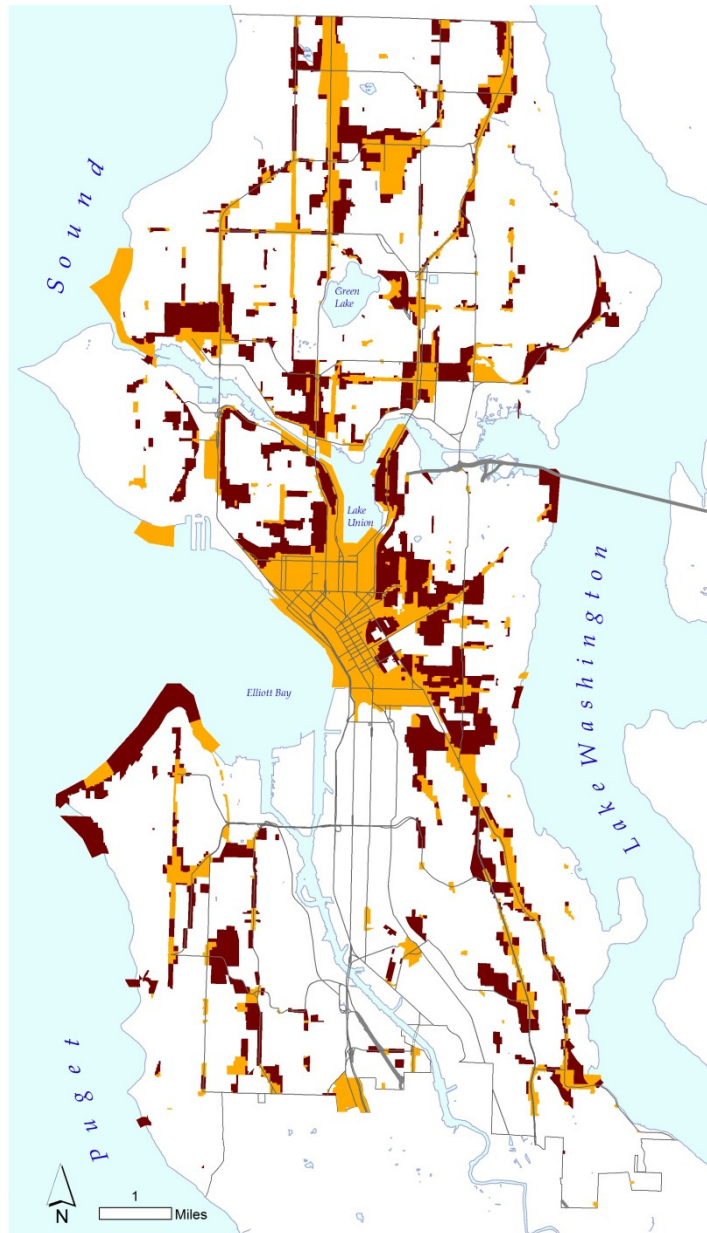
A large portion of the city is zoned for single family.

Zone Category	Parcel Acres	% Total
Single Family	24,706	67.2%
Lowrise	3,450	9.4%
Midrise & Highrise	278	0.8%
Commercial*	1,292	3.5%
Neighb. Commercial	1,553	4.2%
Downtown***	463	1.3%
Industrial	4,125	11.2%
Major Institution**	924	2.5%
Total	36,791	100.0%



* Includes Seattle Mixed (South Lake Union)

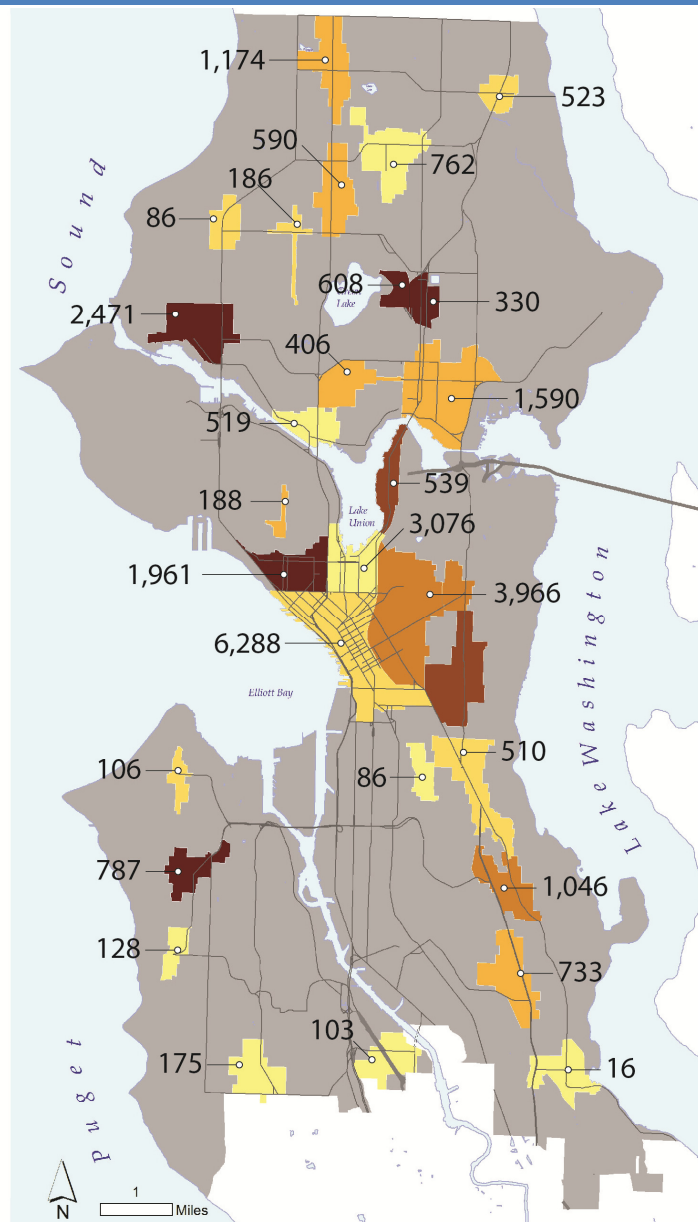
** Includes Yesler Terrace

*** Includes Chinatown/ ID & Pioneer Square



Where Multifamily Housing is Allowed by Zoning

-  In mixed use zones (10.2% of city parcel area) multifamily housing and commercial uses are allowed
-  In multifamily zones (9.0% of city parcel area) multifamily housing is allowed but commercial uses are not

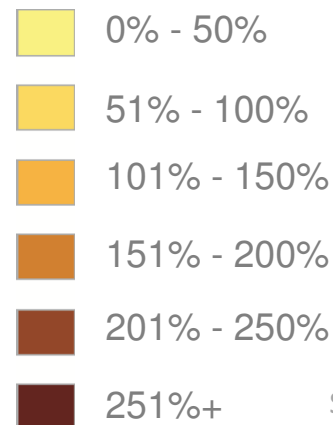


Net New Housing Units By Urban Center/Urban Village

Residential growth has been strong in most Urban Centers/Urban Villages, though some have not seen much new housing.

Total number of net new housing units added in urban center/urban village 2005-3rd Q 2014

2005 through 3rd Q 2014 growth as a percentage of 2005-2024 Comprehensive Plan residential growth targets

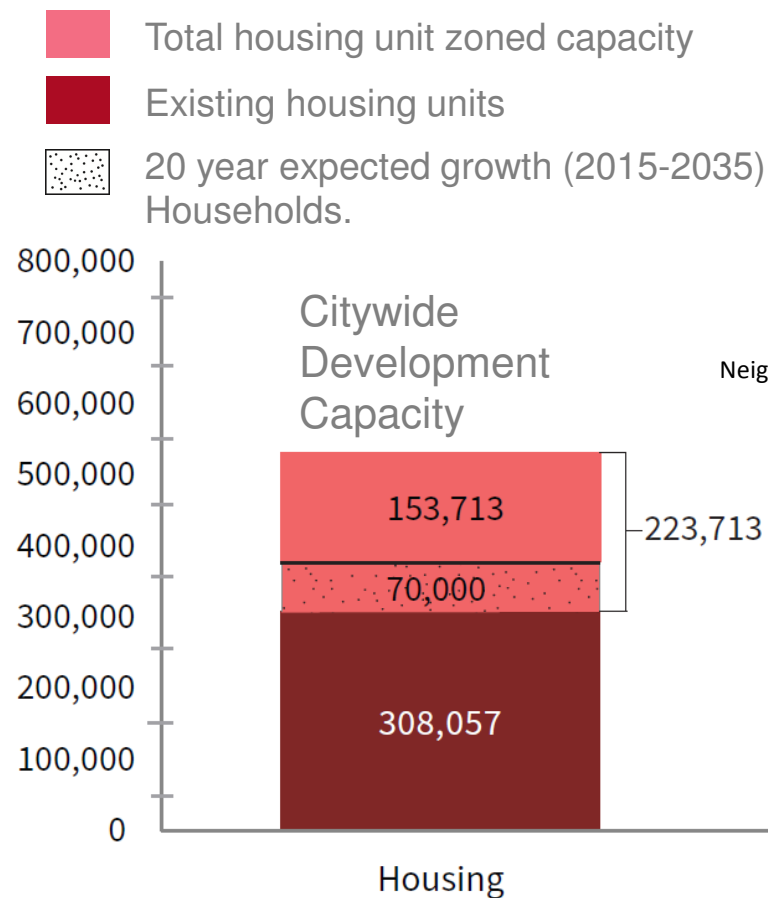


Source: Seattle DPD Urban Center/Village Residential Growth Report (Finaled Permits)

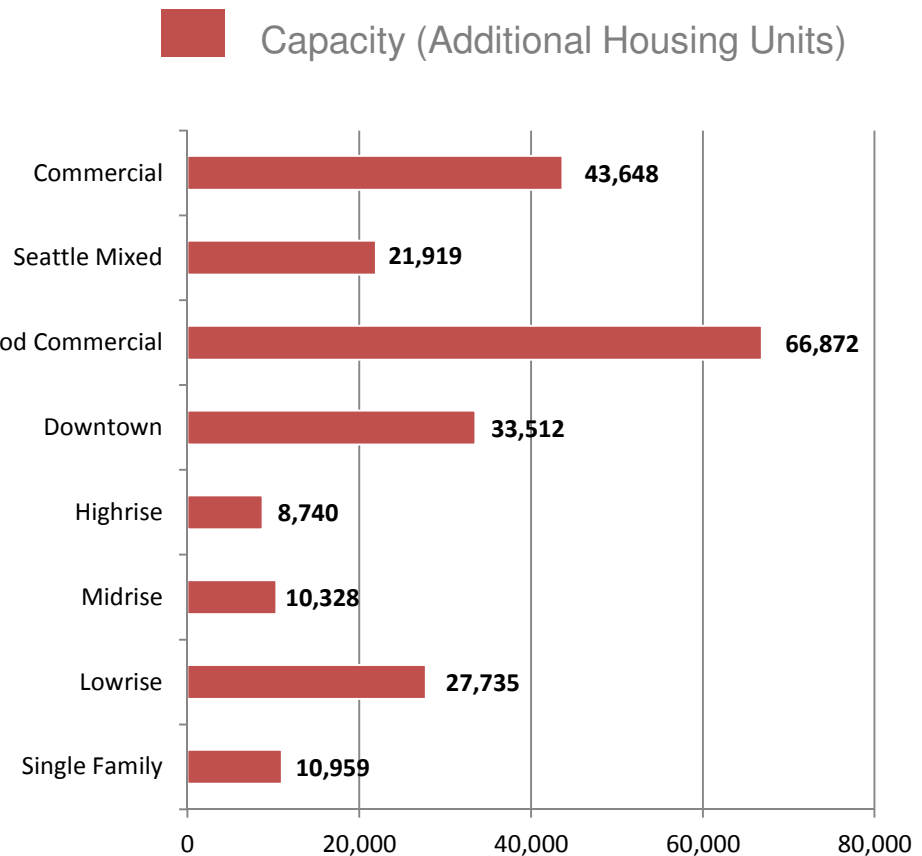


Zoned Capacity for New Housing

Zoning has capacity to accommodate 20 years of expected household growth.



Development Capacity by Zone Category



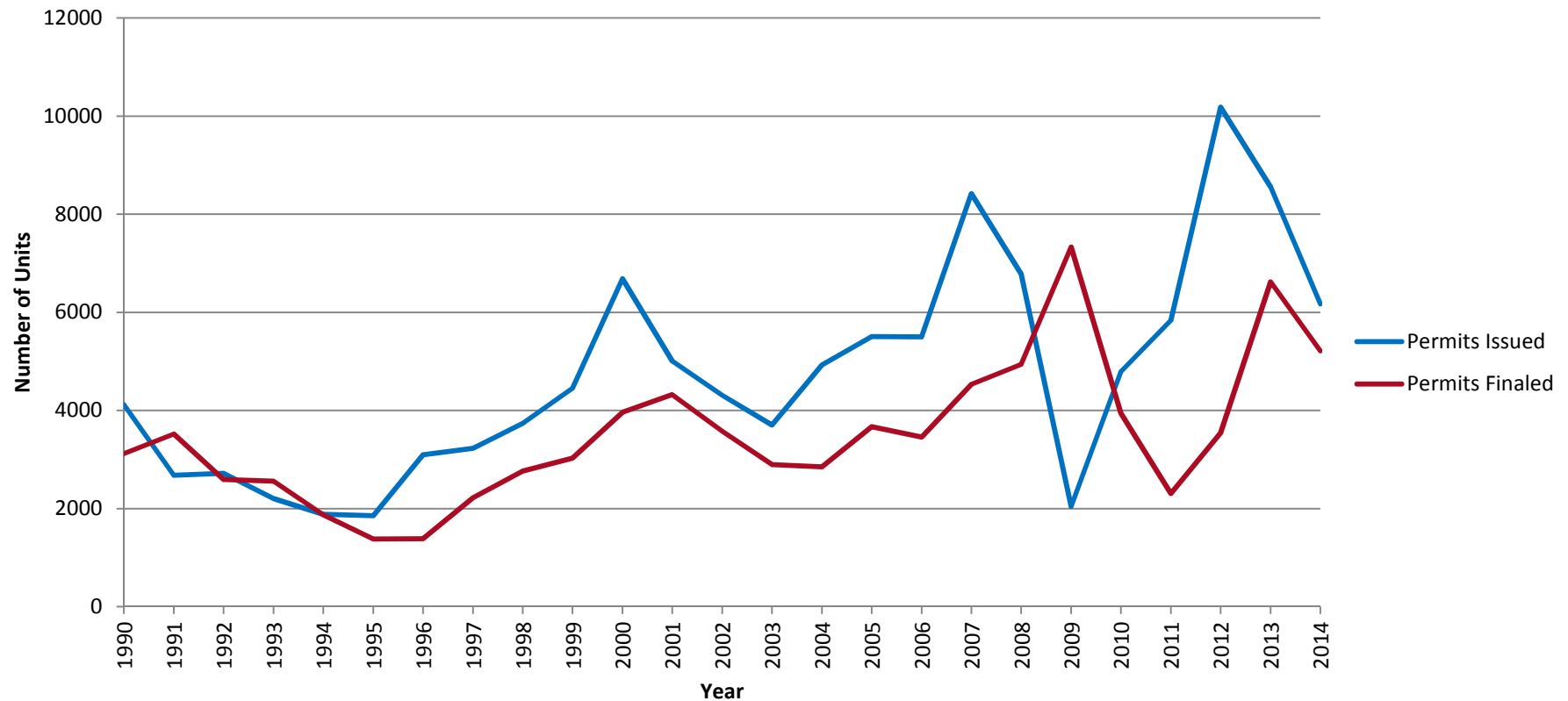
Sources: Seattle 2035, Development Capacity Report, August 2014. Seattle DPD.



Construction and Permit Volumes

We have seen historically high permitting and construction volumes in recent years, although the overall trends are complex.

**Issued Building Permits
and Finaled Building Permits**

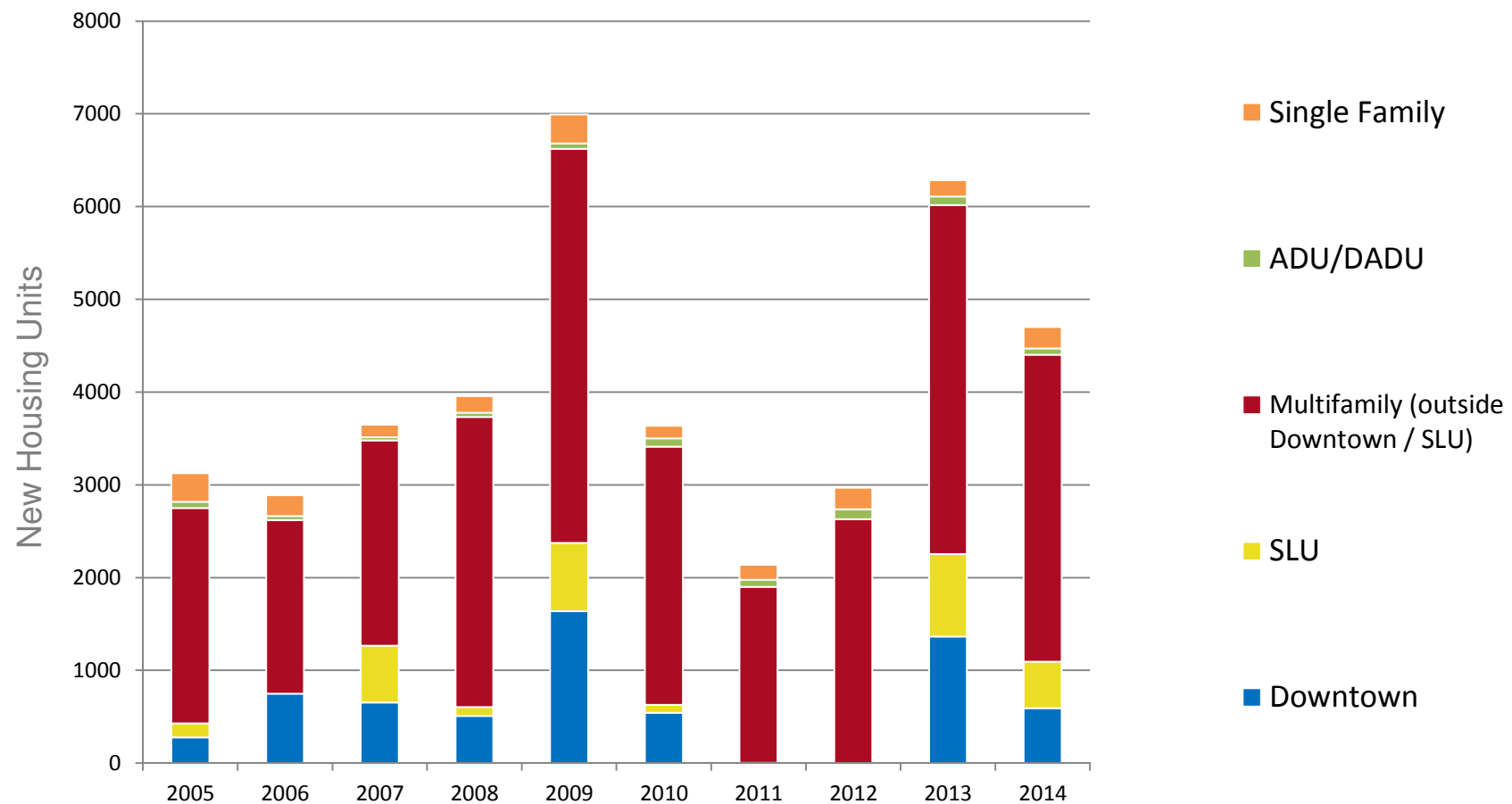


Sources: Seattle DPD Permit Data.



Housing Units Constructed

The vast majority of new housing being constructed is multifamily housing located outside of Downtown and South Lake Union.

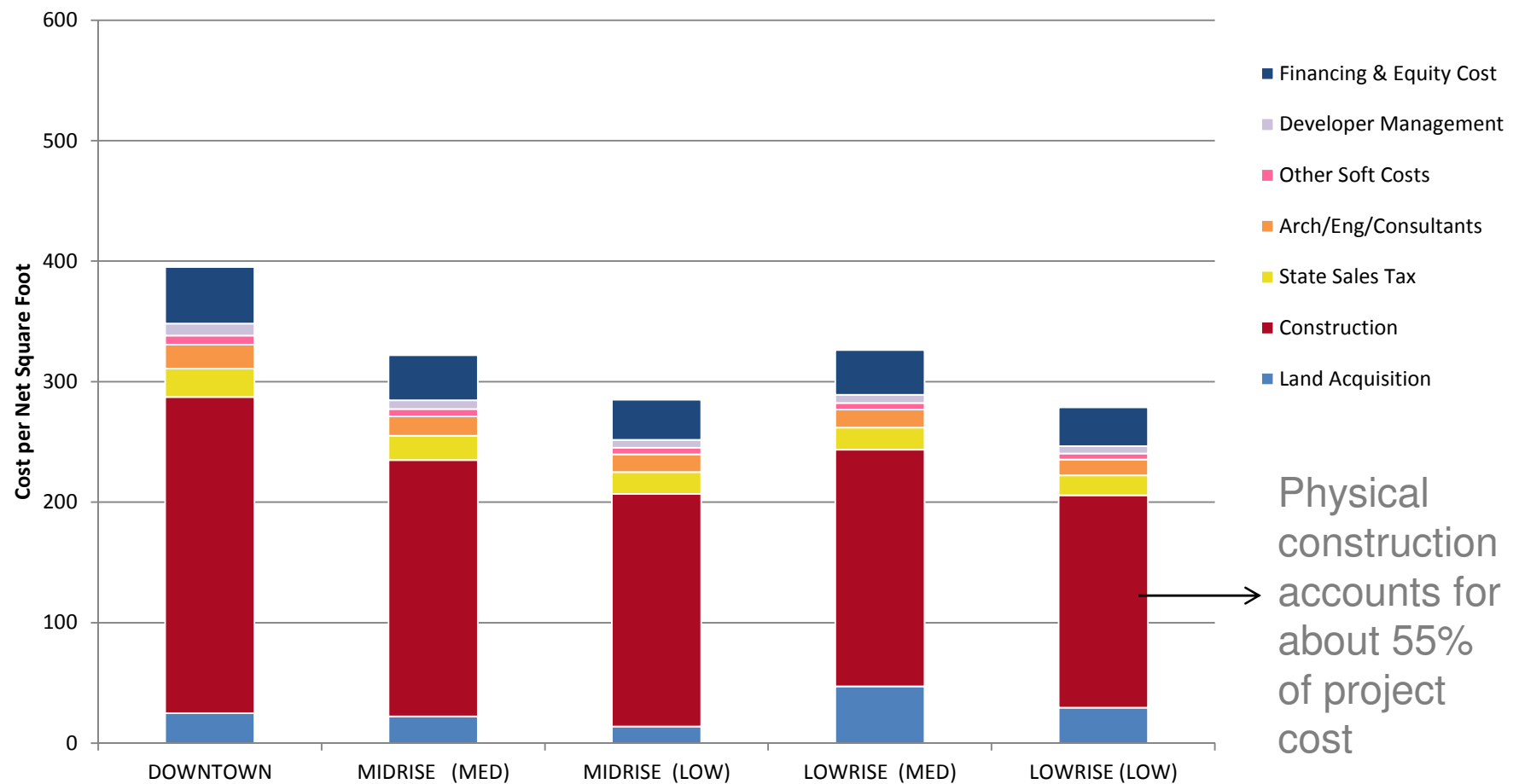


Sources: Seattle DPD Permit Data.



Cost Breakdown of Newly Constructed Housing

Cost of construction is the biggest factor in the cost of new housing, but many factors play a role. Permit fees and other soft costs are a small portion of overall development cost.



Sources: 2014 DRA Study Prototypes.

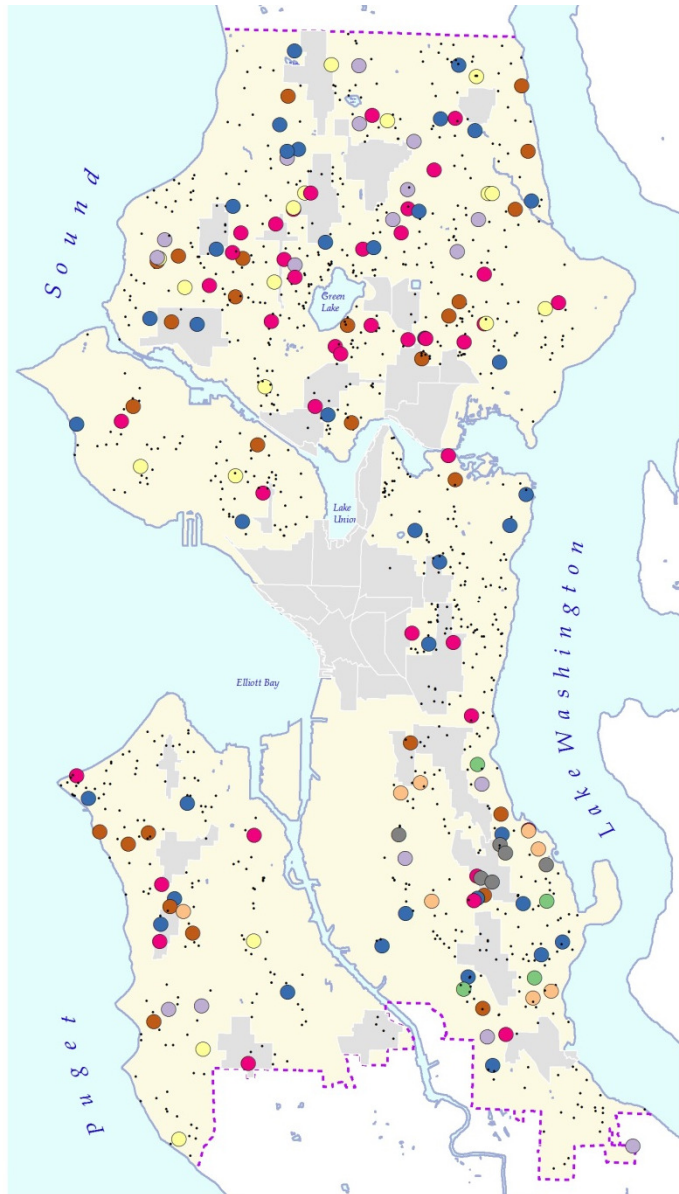


Cost to Construct Parking

Parking is expensive to build and adds to the monthly cost of housing when it is included in a project.

	Central Business District Locations (e.g. Downtown, Belltown)	Urban Locations (e.g. Central District, Ballard, West Seattle Junction)
Estimated Capital Cost Per Parking Stall (Structured)	\$40,817	\$31,583
Estimated Monthly Cost For Parking Stall per Residential Unit (Structured)	\$298	\$237

Sources: King County Right Size Parking. August 15, 2014 Parking Costs and Operating Expense Estimates. Kidder Mathews.



Accessory Dwelling Unit Production

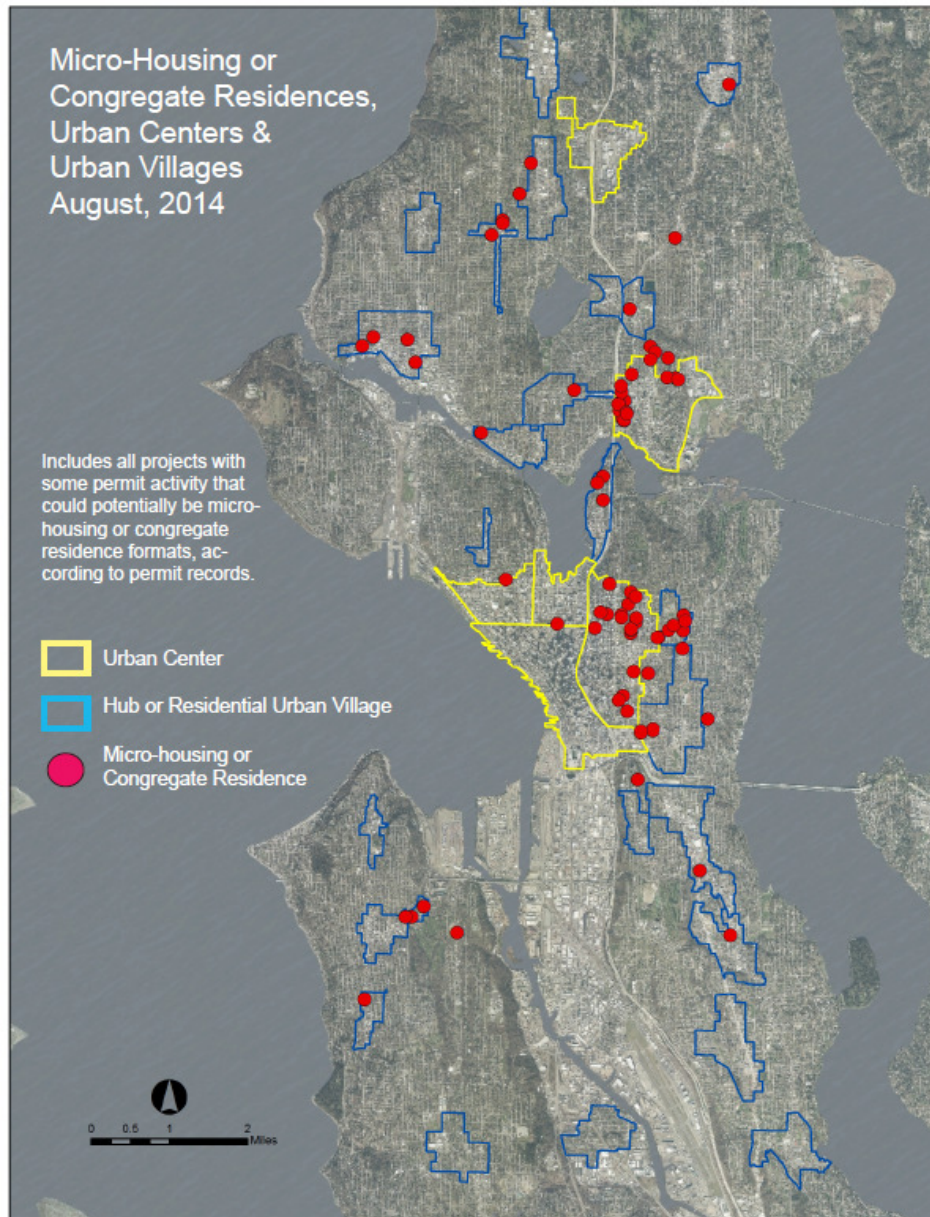
DADU production has been modest since being legalized citywide in 2009.

Detached Accessory Dwelling Units (DADU)
Final Building Permits Issued By Year

Year	Number of DADUs
2007	4
2008	6
2009	8
2010	17
2011	27
2012	40
2013	39
2014	18
Total	159

- **Total Attached Accessory Dwelling Units (ADUs)**
Permitted from 1994 – 2014: Approximately 1,200

Sources: Seattle DPD Permit Data.



Micro-housing and Congregate Housing

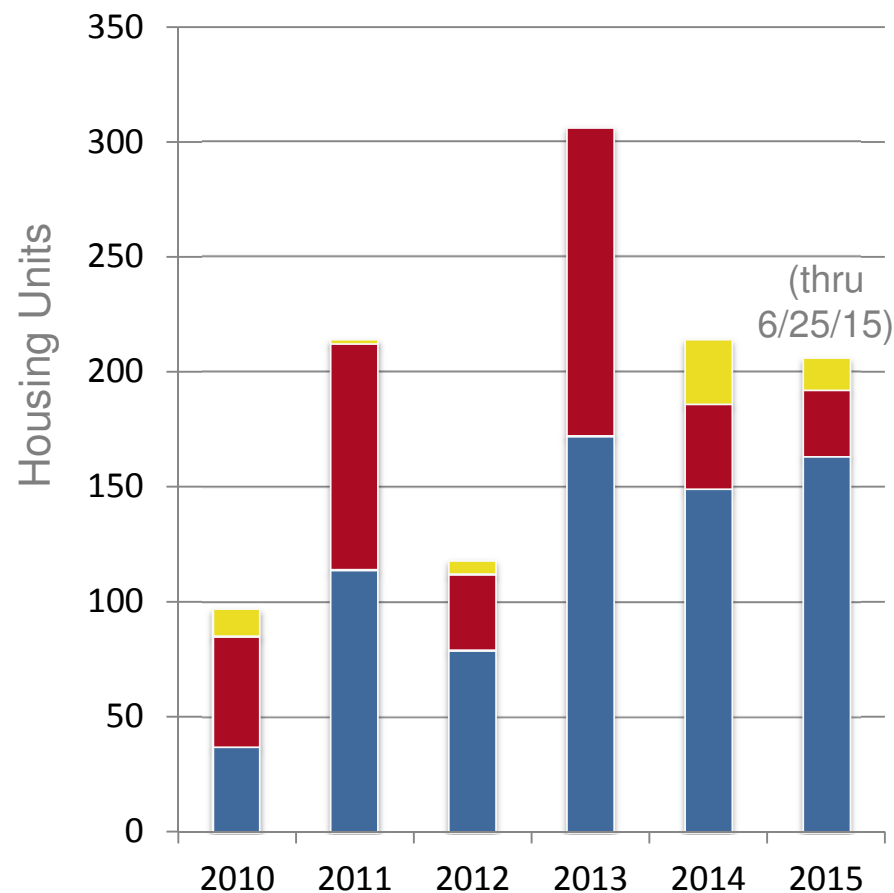
- There were about 64 applications for micro-housing or congregate residence projects between 2009 and 2014.
- 3,500+ sleeping rooms.
- Rents are about \$600 - \$900
- On a per SF basis rents are high (\$3.15+).
- Note: New regulations for Small Efficiency Dwelling Units have since gone into effect.

Sources: Seattle DPD Permit Data.



Tenant Relocation Assistance

Only a portion of potentially eligible displaced households receive assistance through the Tenant Relocation Assistance Ordinance (TRAO) program.

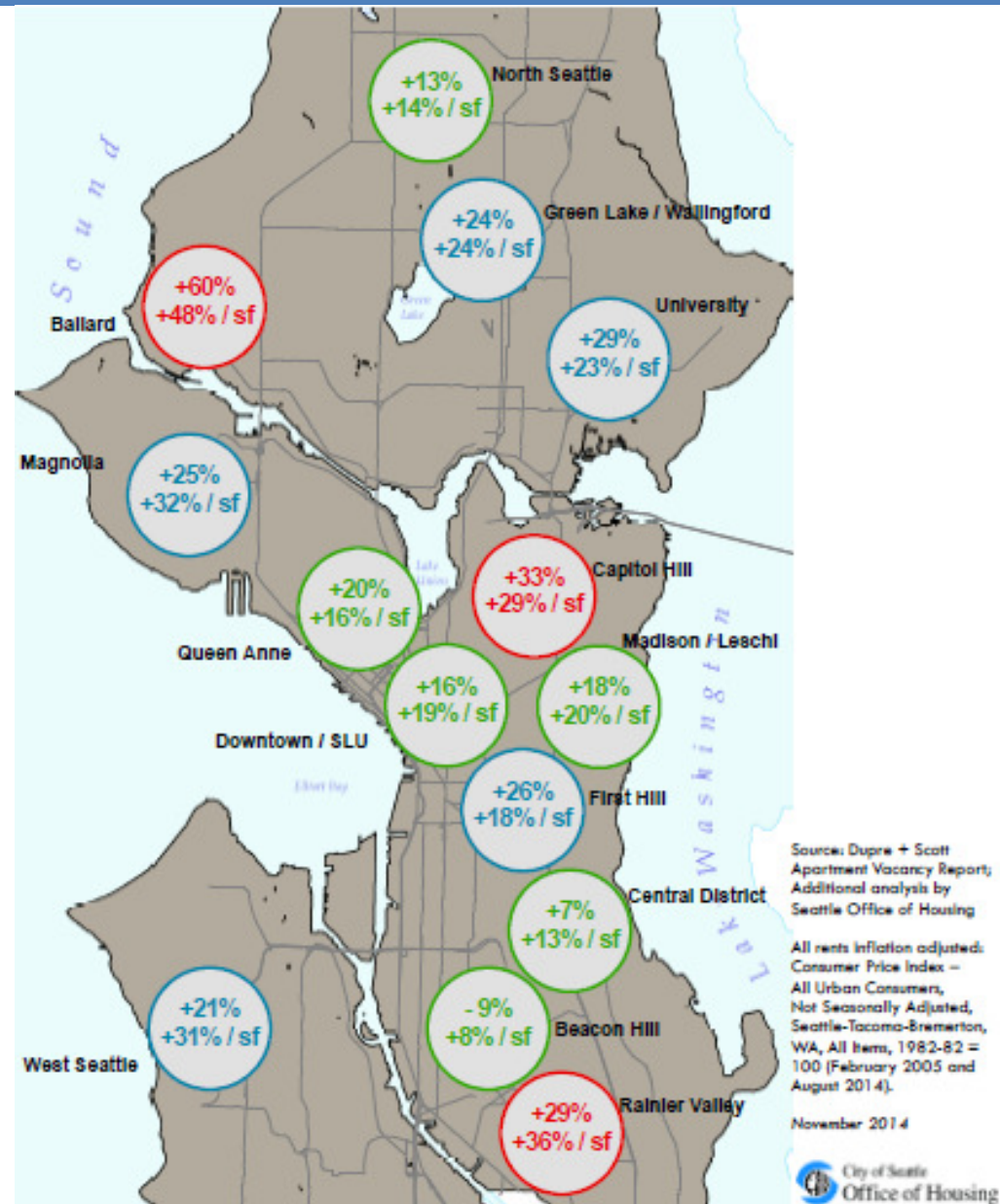


- Eligible.** Tenant household is income qualified and has been approved to receive relocation assistance.
- Not eligible.** Tenant household either did not apply, provided insufficient information to establish eligibility, submitted a late application, or was over income.
- Ineligible to apply.** Tenant household received prior disclosure of development activity and is not eligible to apply for assistance.

Housing Affordability & Livability Agenda

City of Seattle

52



**Percent Change in
Average Rent and
Average Rent Per NRSF
(net rentable square foot)
Spring 2005 – Fall 2014**